
1997/98 NOVA SCOTIA VIDEO LOTTERY PLAYERS' SURVEY

**Nova Scotia Department Of Health
Problem Gambling Services
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Turning Information Into Insight

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NOVA SCOTIA VIDEO LOTTERY PLAYERS' SURVEY (OCTOBER 1997 - JANUARY 1998)

The 1997/98 Nova Scotia VL Players' Survey provides extensive information as to the behaviours, motivations and characteristics of VL players, thereby making a significant contribution to the understanding of video lottery gambling. In addition, the study profiles VL gambling within the context of all adults in the province, thus establishing benchmark measures against which VL play in Nova Scotia can be subsequently monitored and tracked. Specifically, the study results can be directly applied in the design of Problem VL Gambling treatment strategies and harm reduction/minimization initiatives.

The study was designed to offer flexibility in order to ensure the highest quality data upon which to base decisions, while providing a cost effective vehicle for exploring additional issues of interest as required. Given the depth of the information gathered, there is considerable opportunity for on-going analysis of the data to further explore, identify and model response towards VL gambling in order to gain additional insight as to the various underlying factors influencing play of video lottery games. Thus, the Nova Scotia Department of Health, Problem Gambling Services is able to maximize the continuing information return from this leading edge research on video lottery gambling.

PROJECT OBJECTIVES

The primary objective of the project is to:

“develop an extensive and comprehensive profile of video lottery players in the province of Nova Scotia in terms of playing habits, attitudes and lifestyles in order to determine:

- *proportion of players exhibiting problem gambling behaviour;*
- *demographic/characteristics of VL players and the subset of problem players;*
- *impacts on life/lifestyle;*
- *a delineation of risk indicators that will assist in designing prevention and treatment strategies.*

As the first comprehensive study of VL play undertaken in Nova Scotia, the results also provide benchmark measures against which VL play and subsequent intervention and harm reduction strategies/programs can be monitored and tracked. Therefore, *it was also necessary to establish baseline measures of attitudinal, behavioural and psychographical response towards VL gambling within the context of all adults in Nova Scotia for comparison to VL Players.* Rigorous standards in terms of data collection and methodology were incorporated into the study design to ensure data accuracy and reliability.

Based on an extensive literature review and pilot testing for the project, a questionnaire was specifically designed to address the study objectives.

METHODOLOGY

To address the objectives of the study, two independent surveys were conducted by telephone with randomly selected adults in Nova Scotia from Oct. 12, 1997 to Jan. 19, 1998:

1. VL Players' Survey (n=711)
2. General Population Survey (n=400)

VL Player Survey

During data collection, a random sample of 11,691 households in NS were initially contacted for participation in a household screening survey. The Household Screen consisted of a brief survey which identified the total number of adults (19+ years) in the household and VL play status for each adult. Of the 11,691 households sampled, a total of 9,339 households and 18,650 adults were successfully screened, yielding a response rate of 79.9% for the Household Screen. Within this sample, 927 Regular VL Players were identified and 711 (76.7% of all those qualified) completed the VL Players' Survey. The overall response rate for the survey was 61.3%. Thus, the results of the study are representative and generalizable to the population of Regular VL Players in Nova Scotia.

The VL Player interviews ranged from 30 minutes to 2 hours, with an average of \approx 48 minutes in length.

General Population Survey

The General Population Survey was conducted with 400 randomly sampled adults in NS with a response rate of 61.1%. The interviews ranged from 13 to 29 minutes with an average length of \approx 18 minutes.

There were no significant differences between the two samples in terms of estimating the level and degree of adults' involvement in video lottery gambling in NS. This finding is compelling since different sampling techniques were used and, thus, provided convergent validity for the estimate of VL play activity by adults in Nova Scotia.

*****KEY FINDINGS *****

The Key Findings for the study are presented under two primary sections:

- **Provincial Overview of VL Play**
This section provides a summary profile of VL gambling within the context of the total population of adults in Nova Scotia.
- **Problem VL Gambler Analysis**
This section provides a summary profile of those adults characterized as Problem VL Gamblers as compared to other regular VL gamblers in Nova Scotia.

PROVINCIAL OVERVIEW OF VL PLAY

In order to profile VL play within the context of **all adults** in Nova Scotia, the two samples were weighted based on the results of the General Population Survey and combined prior to analysis. To identify the characteristics and behaviours associated with video lottery gambling in the province, all adults were segmented into one of three groups for comparative profiling:

1. Non-VL Players:

- 61.5% of adults in Nova Scotia;
- average monthly expenditure on VLT's = 0;
- includes those who have never tried VL games and, thus, are not currently being targeted for play. This group is at low risk for VL play because they have not tried video lottery gambling and, for the most part, are unlikely to do so. However, there may be adults within this segment who would be vulnerable to VL play if they tried the games or if there were any changes in distribution strategies or management of VLT's in Nova Scotia. While these adults have no personal experience with play, in some cases, they will be exposed to VLT's indirectly through involvement by others. **Non-VL Players comprise the majority of adults in Nova Scotia and, thus, due to their relative size, will exert considerable influence on public opinion towards VL gambling.** Furthermore, evidence suggests they also account for half (51%) of those seeking information or assistance to help others with VL problem gambling.

2. Casual VL Players:

- 32.8% of adults in Nova Scotia;
- average monthly expenditures on VLT's = \$1.29;
- includes those who have tried video lottery games at some time, but are not playing on a regular basis. While they comprise the majority of the target market for video lottery gambling ($\approx 85\%$), these adults do not currently have regular playing patterns and, thus, may differ significantly in terms of behaviours, attitudes and demographic characteristics for VL gambling in particular, and for other types of gaming/gambling in general. Over the last year, approximately half of these Casual Player actually played the games (17.2% of adults). **While Casual VL Players comprise approximately 75% of all those who have played video lottery games in the last year, they account for only 4% of total annual VL revenue in Nova Scotia.** Currently, Casual Players can be characterized as social players, although some have deliberately reduced play or stopped playing, either due to changes in lifestyles or in order to control their play of the games.

3. Regular VL Players:

- 5.7% of adults in Nova Scotia;
- average monthly expenditure on VLT's = \$243.52;
- includes those adults who play video lottery games on a regular, continuous basis (once a month or more). **Therefore, while these adults represent only approximately 25% of those who played VL games in the last year, they are contributing the majority of revenue generated from VL gambling in Nova Scotia (≈96%).** Consequently, Regular VL Gamblers are at greater risk for developing problems with VL gambling due to the frequency and volume of play and will require markedly different intervention strategies than the Casual Players.

Incidence Of VL Play In Nova Scotia

Approximately **38.5%** of all adults in Nova Scotia (≈262,000) have **tried** video lottery games at some time in the past. Overall, **23%** of adults have **played VL games within the last year**. There are **11%** (≈75,000) who **have played in the last month** (prior to data collection), with **approximately 5.7% of all adults in the province characterized as regular players** (≈39,000 who played VL games once a month or more, on average, in the last three months).

The percentage of adults in the population who are identified as Regular VL Players tends to be lower than previous estimates obtained from other studies in Nova Scotia (5.7% versus ≈8% - 10%). The estimate of 5.7% obtained in the current study is accurate $\pm .33%$ at the 95% confidence level. The principal reason for the difference between the current study and other research estimating the incidence of Regular VL play is due to sampling.

Measures of lottery gambling, historically, have been included in studies which were initially designed to measure other regulated gambling activities. It appears that video lottery play is very different from other gambling activities such as lottery draws, bingo and sports betting which are most often tied to specific play times or schedules and/or accessibility to play. Generally, there is a delay between the actual purchase/play and outcome. These factors directly influence play levels and exert some control on play. Video lottery gambling, however, is continuous, accessible and the schedule of play, for the most part, is self-imposed with no definable start/finish time for play within the prescribed hours of operations for licensed establishments in Nova Scotia. It is, therefore, possible for adults to undertake binge play of the games (play heavily on a sporadic basis), with breaks or stops in between those times when they do play frequently. This “irregular” regular play is often a consequence of extraneous factors interrupting play (e.g., travel, other activities/events) or is deliberately imposed in attempts to control or manage their VL play.

Defining regular VL play based on those adults who have played in the last month tends to overestimate the percent of the population who are typically playing VLT's. In fact, in a given month, only half of those adults who have played the games do so on a continual basis while the other half tend to play on only a casual basis. These casual players represent a distinct player group who play less often, play for different reasons and spend significantly less when they do play. Thus, while casual players may account for half of the adults who have played in

the last month, they will only represent a very small proportion of those actually playing the machines at any given time, and contribute a minimal portion of monthly VL revenues. This has implications for projecting results to the population, particularly when estimating gambling revenues and regular player behaviour.

For example, on average, **those casual VL players in Nova Scotia who played VLT's in the last month spent approximately \$8.05 on video lottery play, versus approximately \$243.52 for those adults identified as regular, continuous players.** If these revenue estimates were used to calculate average expenditures for VL players in the last month, the amount spent per VL player in Nova Scotia would be approximately \$130.97. While the projected estimate of annual net revenue for VLT's remains unchanged at approximately \$117,475,000, the results would suggest that approximately 11%, or approximately 75,000 adults in Nova Scotia, are contributing to this amount. In reality, **5.7%, or approximately 38,750 adults, are contributing approximately \$113,236,800, or approximately 96%, of the annual net revenue for video lottery gambling in the province.** Therefore, it can be assumed that VL play behaviour differs significantly among those who are Casual VL Players and those who play on a regular, continuous basis and that these distinctions have significant implications, in terms of profiling VL gambling within the population at large.

Lapsed Regular VL Player

Approximately **4.5% of adults in Nova Scotia (≈31,000) may be categorized as Lapsed Regular VL Players**, or adults who used to play regularly (i.e., once per month or more) at some time in the past, but currently play once every few months or less often.

It appears that 1.4% of adults stopped playing over the last year (primarily due to concerns about addiction or spending too much money). However, this was offset by an additional 1.3% of adults who *started* playing on a regular basis during the last twelve months. **Therefore, it can be estimated that there is a relatively high amount of churn (turnover in the percentage of adults playing regularly) within the Regular VL Player base in Nova Scotia, with approximately 25% of Regular Players ceasing play and a similar proportion taking up regular playing patterns. However, on average, current Regular VL Players have been playing the games on a regular basis for 3.6 years, suggesting that regular playing patterns for VL games are fairly entrenched for these adults.** It is noteworthy that the percentage of adults in Nova Scotia who have ever tried video lottery games has remained fairly constant over the past few years with approximately one-third (≈30%-35%) of Nova Scotian adults typically having tried the games (Source: Previous gambling research including NSAGA Prevalence Studies). It appears that slight gains in the percentage of adults who have tried VLT's (1998: ≈38%) are largely attributable to those in the youngest age groups (19-24 years) who are trying the games once they are allowed to be in licensed establishments. This suggests that, for the most part, there are few new players being enticed to try video lottery. Rather, it appears that once an adult has tried the games some of these players tend to move in and out of regular playing patterns. It will be important to determine if, over time, the greater tendency for young adults to frequent locations which have the machines and, therefore, to try VLT's will translate into an increase in the size of the regular VL player base.

Comparative Liking Of Video Lottery

The results suggest that, for approximately one-quarter of all Regular VL Players (and for one-third of those who played in the last month), factors other than game appeal or liking are contributing to regular play levels. The fact that 25% of Regular VL Players dislike the games, as compared to other gambling options, yet continue to play heavily, is of concern as this suggests their behaviour is motivated by habit (or compulsion) rather than enjoyment or preference for the activity. It should be kept in mind that, in some cases, VL play may be an accessible and convenient gambling outlet for those who do not have access to more preferred options (casino, horse racing). **Regardless, the fact they continue to play a game they do not necessarily like is indicative of potential problems for a significant portion of players.**

Demographic Characteristics

A comparison of demographic profiles between Regular VL Gamblers and the rest of the adult population found that Regular Players tend to more often be male; are younger (especially 19-24 years); are less educated; are more likely to be single/never married; and to live in multi-adult households without children. This corresponds with people who are more socially active outside the home, spend more time at bars and locations where the machines are found, are less religious, and, therefore, more likely to be tolerant of gambling. The majority are employed, presumably in Blue Collar occupations, and, thus, have access to a pay cheque in order to support the activity. It is reasonable, therefore, that these individuals are more likely to be regular players of VLT's.

However, these are not necessarily the demographic characteristics that are associated with problem VL gambling. The demographic analysis of regular and problem VL play does provide insight as to particular groups at potentially greater risk for developing problems with play.

Social, Leisure & Recreational Activities

The results suggest that adults who play VL games tend to be “busy people” in general. When compared to Non-VL Players, they are more likely to entertain at home, visit other people in their homes, socialize at bars/licensed establishments, participate in organized sports, work outside the home, relax at home, participate in hobbies/crafts and play games (both for money and for fun). While there is undoubtedly some overlap among these activities (e.g., a weekly poker game with friends may be considered both socializing with friends at their home and playing games for money), it would seem that VL Players have no shortage of weekly social activities. Conversely, it appears that Non-VL Players, in general, tend to spend more time during a given week doing fewer different activities (e.g., household chores, hobbies/crafts, relaxing at home) and, thus, arguably have a “*slower paced*” lifestyle centered more often on family and their community.

Compared to other adults, Regular VL Players are more inclined to attend live sporting events (38% versus 24% - 27%), and less likely to go to cultural, historic or educational sites or centres (33% versus 41% - 44%). While this tends to be influenced in part by the demographic profile for Regular Players (skewed towards males, singles, younger adults, without children), it appears that **Regular VL Players are attracted to entertainment options which are more exciting**

and physically stimulating rather than cultural, educational pursuits or those activities requiring self or personal involvement.

Involvement In Other Gambling

For the most part, playing games for money in Nova Scotia is a widespread and socially accepted entertainment option. Almost every adult in the province (94%) has played at least one type of game offering money prizes before, and the strong majority (80%) participated in at least one gambling activity in the last month. Just over half (54%, or ≈367,000 adults) gamble on a regular monthly basis.

The percentage of Non-VL Players who participate in gambling activities regularly (46%) and in the last month (76%) are only slightly below the population figures, while Casual VL Players are more likely to play a game for money regularly (62%) and to have played in the last month (85%). Regular VL Players, by definition, play at least one gambling activity regularly and have played in the previous month.

Regular VL Players tend to play a greater variety of gambling options regularly, with an average of 3.1 games played on a regular monthly basis and 4.1 different gambling activities played in the last month. This means that, on average, Regular VL Players report regular monthly playing patterns for approximately one-quarter of the 13 gambling activities currently offered in Nova Scotia and, in general, each month will be involved in almost one-third (32%) of these same gambling options. In fact, the number of gambling activities played increases in relation to involvement with VL gambling. Non-VL Players participate in the fewest gambling options on average, both regularly (0.8) and in the month prior to data collection (1.6), while Casual VL Players play significantly more games of chance for money (1.0 regularly, 2.2 in the last month).

These results suggest that Regular VL Players are “consummate gamblers”. This group of adults appears to be attracted to games of chance played for money to a much larger degree than other adults. More than half (61%) of Regular VL Players are monthly lottery draw ticket players and approximately one-third (33% to 36%) buy Atlantic Lottery’s Instant Scratch ‘n Win ticket games, compared to less than 10% of those adults who do not play video lottery games on a regular basis. Regular VL Players are at least three times as likely as other adults to also be regular players of 50¢ Breakopens (14% versus 4%), bingo in a bingo hall (13% versus 4%), card games for money outside a casino (9% versus 2%), slot machines at a casino (7% versus 1%), Sport Select Proline (7% versus 1%) and other sport bets or pools (6% versus 1%).

Regular VL Players play more gaming options (4.1 in the last month) and far out-spend the other segments on most games. As a whole segment, Regular VL Players are interested in all forms of gambling and reserve approximately 24% of their gambling funds to spend on these other games. It is not known how much they spent on other games before playing video lottery games, nor is it known how much they would spend on these games were VLT access restricted. It is possible that many Regular VL Players switched expenditure to VLT’s from these other forms of gambling once the machines became available, or as they developed regular playing patterns of the video lottery. It may be that a good portion of their gambling budget would be switched back to them, if their VLT play was curtailed.

Accessibility

Currently, VLT machines are restricted to licensed establishments in Nova Scotia with ≈ 3225 terminals distributed throughout the province. Therefore it can be assumed that frequency of going to a bar/lounge/pub and, thus, being exposed to the opportunity to play, will be associated with involvement in VL gambling.

Typically, 30% of all adults in Nova Scotia go to licensed establishment on a regular basis of once per month or more. Not surprisingly Regular VL Players are more than twice as likely as even Casual VL Players to be in a bar location each month (88% versus 40%). Only 20% of those who have never tried VLT's (Non VL Players) are in licensed establishments each month, with the majority (59%) indicating they do not go to bars on even a casual periodic basis.

It may be somewhat surprising to note that 12% of Regular VL Players are not typically in bars/pubs/lounges on a monthly basis. This suggests that, despite the heavy skew of the machines towards these types of bar locations, there is still a sizable proportion of Regular Players who are continuing to play the machines elsewhere. In most cases, this includes restaurants or Native gambling establishments. However, for others, it suggests regular play at private (illegal) locations ($\approx 3\%$ of Regular VL Players).

It should be kept in mind that, despite the greater tendency for Regular VL Players to be in bars, Casual and Non-VL Players still comprise the bulk of those adults who are in bar locations each month (83% versus 17%). However, **Regular VL Players go to bars approximately four times more often than other monthly bar patrons so they will make up a larger proportion of adults who are in the bars each day.** In fact, one-third (33%) of all those adults who are in a bar more than once a week are Regular VL Players. This means **Regular VL Players account for only 17% of all adults who go to a bar location each month, yet on any given day, they will comprise up to 33% of all those in a bar/pub/club or lounge in Nova Scotia.** Not surprisingly the profile of bar patrons in NS is very similar to that noted for regular VL gamblers.

For the most part, simply by virtue of where the machines are located, (e.g. bars, licensed establishments) Non-VL Players are less inclined to be exposed and, therefore, to try the games. Older adults, women, homemakers, those who are retired, and those with children in their households all tend to have a higher incidence of those who have never tried the machines. However, for adults in these segments who do try the games they are just as likely to adopt regular playing patterns, and to experience difficulties in managing their play. In some cases (such as for those who are retired) given their lack of experience or exposure to this type of gambling they may be at greater risk for developing problems.

On average Nova Scotians are typically in at least 3 locations which offer VLT's each month. When all locations which have video lottery machines are taken into consideration, Regular VL Players are typically in these locations approximately eleven times each month versus only 4.3 for Casual VL Players and 2.2 for Non-VL Players

Of all the times Regular VL Players are in locations which have VLT's, on average, they will play the machines just over half of the time (57%). Only 25% of the times they are in VLT locations are to specifically play the games. Regular VL Players are generally more inclined to play the games on impulse; they have gone to a VLT location for other reasons (e.g., to socialize, play darts, etc.) and in 32% of the cases, will end up playing video lottery as well. **Therefore, the play frequency of video lottery games for Regular VL Players is strongly influenced by the greater inclination for these adults to be in locations which have the machines for reasons other than to play the games. On average, over half of the times (56%) they play video lottery is on impulse "because the machines are there" and available for play.**

It is noteworthy that 34% of Regular VL Players tend to play VL games **every time** they are in a location which has the machines. This group of Regular Players represents approximately 2% of all adults in Nova Scotia. On average, these players are in VLT locations less often than other Regular Players (7.7 times/month versus 12.6 times/month), yet almost half of the time they are there is to specifically play the games (46%) versus only 15% for other Regular Players. Impulse play is also higher for these "every time" Regular Players (54% versus 20%). **Therefore, the majority (66%) of Regular VL Players only play VL games approximately 35% of the times they are typically exposed to play. For the remaining one-third of Regular VL Players (the "every time" players), approximately half of the time they are exposed to VL games each month is to deliberately play the games and in the other half of the cases, they end up playing anyway.**

There are significant demographic differences in the profile of Regular Players who play every time they are exposed to the machines versus those Regular Players who do not.

The incidence of "every time" players tends to be higher for Regular Players in the following segments:

- Regular VL Players who are 55 years of age or older (59%). Players aged 19 - 24 are least likely to be playing every time they are in a location with the machines, especially compared to those over 40 years (26% versus 41%). This means that, although the youngest VL players in Nova Scotia are in bars more often (12.7 versus 10.4), they actually end up playing slightly less often, on average, than older players (≈ 4.8 versus 5.1 times per month);
- those living in single person households (50%);
- those who are separated/divorced or widowed (50%);
- those with lower household incomes (under \$25,000: 42%)
- those Regular Players with lower education levels, especially with vocational/trade school educations (38%), as compared to those with university level educations ($\approx 27%$);

While these adults do not necessarily represent Problem VL Gamblers it appears that Regular Players in these demographic segments are at greater risk for having problems in managing their play and, thus, may benefit from assistance in controlling play when they are exposed to the games at VLT locations.

It is noteworthy that while impulse play of the machines contributes to the frequency of play for Regular VL Gamblers, the evidence suggests that planned play (i.e., those who are at a location specifically to play the machines) is more strongly associated with problem VL gambling. Thus, opportunities exist to intervene or interrupt playing patterns as the decision to play is often made before the Problem Gambler is in front of the machine (See summary of Problem VL Players Analysis).

Smoking Habits

Overall, approximately 29% of adults in Nova Scotia currently report they smoke cigarettes on a regular basis, with an additional 6% characterized as social smokers who only “*light up*” on a part-time basis in social situations or when they are drinking. Approximately two-thirds (66%) of all Nova Scotian adults are non-smokers, yet only 35% of Regular VL Players fall into this category. Undoubtedly, there is a strong relationship between VL play and smoking.

Over half (57%) of Regular VL Players smoke on a regular basis which is significantly higher than for either Casual (34%) or Non-VL Players (23%). Interestingly, Casual Players are more inclined to smoke on a regular and social basis than Non-VL Players, although not to the extent noted for the Regular VL Players.

The association is most likely due to the tendency for fewer non-smokers to go to bar locations on a regular basis (25% versus \approx 40% of smokers). More than half of all social smokers (58%) and 35% of regular smokers are in bar locations once a month or more. In fact, 40% of all those who are in a bar once a week or more are regular smokers. **Not surprisingly, this would suggest more smokers have access to play of VLT's in Nova Scotia than non-smokers** since the majority of VLT's are distributed in bar locations throughout the province. The restrictions instituted during the past decade on smoking in public places may have encouraged more frequent bar patronage for smokers. As the locations where smoking was permitted steadily decreased (theatres, restaurants, shopping malls), regular smokers may have stopped going as often to “*smoke free*” locations for entertainment purposes, in favour of heading somewhere they could smoke freely. Given the amount of time Regular Players typically devote to VL play (\approx 1 hour and 9 minutes each time they play), it is probably less uncomfortable for another smoker to be sitting in a “*smoky*” environment for extended time periods.

In general, 62% of Regular VL Players smoke while they are playing VLT's, and 20% smoke more than usual when playing the games. This means almost one-third (32%) of those Regular VL Players who smoke are smoking more heavily while playing video lottery games.

Given the tendency for Regular VL Players to be smokers, it might be speculated that limiting the machines to smoke free areas may reduce the amount of time Regular Players would devote to play of the games. It may be argued that such a move might serve to counter the greater access smokers have to the machines by virtue of where the VLT's are located (bars/pubs/lounges). To some extent, this may be effective in reducing play for a significant portion of players, however, it is noteworthy that the incidence of problem VL play does not differ significantly for those Regular VL Players who smoke (18%) or are non-smokers (14%). (Since smokers comprise a larger proportion of Regular VL Players, they will also make up a

larger proportion of Problem Players, but they are no more likely than non-smokers to develop problem play of the games)

Drinking Habits

For the most part, Regular Video Lottery Players are not drinking frequently or heavily when they play the games; 26% never drink alcoholic beverages when they are playing,

For the 74% of Regular VL Players who do drink while playing VLT's, almost half (47%) do so only rarely or on an occasional basis, essentially drinking less than 50% of the time they are playing. Only 22% of Regular VL Players always drink and 17% frequently partake of alcoholic beverages during VLT play.

In general, Regular VL Players do not play when they feel they have had too much to drink. In fact, only 24% indicated that they have ever played the games when they would have considered themselves to have been intoxicated (had too much to drink). The results suggest that Regular VL Players want to be focused on the game and that they believe, for the most part, drinking either "*eats up*" resources that can be used for VL gambling or that it interferes with their ability to play and manage their play of the games. Fourteen percent (14%) of all Regular VL Players indicate that alcohol plays a role in those situations when they tend to exceed their budgets or spend more time and/or money on VL gambling than they intended. Comments centered on the greater tendency for players to bet at higher levels or take greater risks when betting. In most cases this results in players spending their "*VL money*" faster. For others, there is a tendency to spend more or "*too much*". As a result, most players tend to avoid excessive drinking, or alcohol in general, while playing VL games.

VL Gambling & Entertainment Expenditures

It will be recalled that, generally, Regular VL Players are more inclined to be involved in other gambling activities available in Nova Scotia and, typically, spend more than other adults when they gamble. Furthermore, Regular Players tend to be socially active outside the home and appear to invest more time and money in entertainment activities, particularly as it relates to gambling. These findings lead to a number of questions regarding expenditures by Regular Players. For example, do Regular VL Players spend more than other adults on entertainment, gambling in general, and video lottery specifically; or do Regular VL Players simply allocate more of their entertainment budget to gambling and VL play and, thus, are spending less money than other adults on non-gambling entertainment?

To understand the impact of their VLT expenditures, it is necessary to comparatively examine spending activity by all adults within the context of total gambling and entertainment expenditures in Nova Scotia.

On average, adults in Nova Scotia spent approximately \$124.79 each month on entertainment and gambling activities. Gambling specifically comprises approximately one-third of their total entertainment budget, with video lottery accounting for 11.5% of all general entertainment expenditures in the province

Given the continuous nature of play and easy accessibility of video lottery gambling, it is difficult for players to keep track of their expenditures. This is one of the key factors contributing to players' problems in managing their VL play. Consequently, weekly or monthly estimates by players as to the amount they spent on VLT gambling will often vary from actual expenditures. However, players find it relatively easy to provide out-of-pocket estimates of expenditure on a per play basis, as it is more relevant to their actual play behaviour and experience.

- ♦ "I usually put \$20.00 into the machine when I sit down and I play until I lose it;"
- ♦ "I spend \$5.00, one loonie at a time;"
- ♦ "It varies, but usually I end up spending about \$50.00 of my own money every time I play the machines--sometimes you get really lucky though."

By applying per play estimates to the actual number of times they played in the last month (i.e., how many times in a location with VLT's; how many times played either planned or on impulse), it is possible to **derive expenditure estimates based on amount spent rather than amount wagered**. This has proven to yield more accurate estimates of net revenue for video lottery gambling.

The results suggest that net revenues for VLT gambling in Nova Scotia for 1997/98 will be approximately \$117,336,923 which represents an estimated increase of approximately 10.7% over last year (source: NS Alcohol & Gaming Authority 1996/97: \$105,929,806). (Note: According to 1997/98 figure of \$120,000,000 recently released, the derived estimates are within 2.5% of actual revenue)

In total, it was found that **Nova Scotians spent approximately \$340 million dollars on gambling in the province over the last year** (however, it should be emphasized that expenditure refers to out-of-pocket expenditure).

Comparatively, **Regular VL Players**, on average, are spending almost three times as much money as **Casual VL Players** each month on entertainment and gambling activities (\$435.97 versus \$151.40) and five times as much as **Non-VL Players** (\$435.97 versus \$81.87).

There is no difference in the amount Casual and Regular VL Players spend on general entertainment (\$120.48 versus \$117.33). Therefore, the primary difference between expenditures in these segments **is due entirely to gambling expenditures by Regular VL Players**. By definition, video lottery play is substantially higher for this group, with **Regular VL Players, on average, spending \$243.52 each month on video lottery play, as compared to only \$1.29 per Casual Player**.

When only those adults who have played video lottery games in the last year are considered, it can be estimated that approximately 23% of all adults in Nova Scotia played the video lottery games at least once. **Casual Players comprise approximately 75% of all those adults who played, yet contributed only 4% of total revenue for video lottery. This means that Regular VL Players make up only 25% of all those who have played VLT's in the last year, yet contribute 96% of the revenue for the games.**

Despite the tendency for **Casual VL Players** to spend twice as much as **Non-VL Players** on non-gambling entertainment (\$120.48 versus \$60.26), both groups are spending a similar proportion of their entertainment dollars on gambling (20% versus 26%) and non-gambling activities (80% versus 74%). Conversely, **Regular VL Players dedicate 73% of all their monthly entertainment expenditures to gambling activities.** Interestingly, they spend a similar percentage of their entertainment budget, as other adults, on other gambling, excluding VLT's (17%). However, **they spend more than half (56%) of their entertainment dollars specifically on video lottery gambling.**

Despite the greater tendency for **Regular VL Players** to be in licensed locations in order to play the machines, it appears they **are not spending their money on alcohol, food, or other extraneous expenses.** In fact, given their propensity to be involved in social activities outside of their homes (see Section 2.4 - Social & Leisure Activities Profile), the results suggest that Regular VL Players may be spending less on non-gambling entertainment than would be the case if they were not devoting such a significant portion of their "*disposable income*" or entertainment budget to VL play. Undoubtedly, video lottery gambling is an important and sizable part of Regular VL Players' entertainment. If these adults were not spending such large amounts of time and money on video lottery gambling, the results suggest, in many cases, they may be more inclined to be using their resources for other entertainment based activities (switching their VLT expenditure to other activities). However, given that gambling is such a pervasive activity for these adults it may be very difficult for them to eliminate play without undertaking significant changes to their lifestyle. Furthermore, these players may simply transfer their VL gambling to another gambling activity. It may be that assisting these players in developing control mechanisms to help them manage their gambling may be an effective approach, in particular for those cases where VL gambling has not yet reached problematic or extreme levels.

On average, Regular Players dedicate 56% of all their entertainment expenditures to VLT's and 73% collectively to gambling activities. However, within the Regular VL Player base, there are distinct differences among the players in terms of VLT expenditure and the proportion of entertainment dollars allocated to VLT's.

Almost half (49%) of all Regular VL Players spend less than 30% of their entertainment expenditures on video lottery gambling, with a total of approximately 72% allocating less than 50% of their "*fun money*" to play of the machines. This means that approximately 30% of Regular VL Players are spending the majority of their entertainment dollars (50%+) on video lottery gambling.

Impact Of Exposure To VL Play

As noted previously, adults who are Regular (10.8 times per month), Casual (4.4 times) and Non-VL Players (2.2 times) in Nova Scotia are, not surprisingly, differentiated by the frequency they are in locations which have video lottery machines. This is largely a function of the current distribution strategy for VLT's in the province, and is influenced by demographic characteristics and lifestyles. However, adults in Nova Scotia can also be exposed to VL gambling both directly and indirectly through their relationship with other adults who play the games.

Overall, only 5.7% of adults are identified as Regular Video Lottery Players in Nova Scotia and, yet, 47% of all adults in the region state they have fairly close personal contact with someone who plays the games on a regular basis. This would suggest that almost 320,000 adults in Nova Scotia have contact with someone who plays VLT's on a regular basis which translates to, on average, 8.2 adults for every 1 Regular VL Player in the province.

Regular VL Players only comprise 10% of all those adults who have close friends, family or co-workers who play VLT's each month. The remaining 90% ($\approx 287,000$ adults in Nova Scotia) do not play VL games regularly themselves, yet report having relatively close contact with at least one Regular VL Player. In fact, approximately one-third (34%) of these non-playing adults either live with a Regular Player or have a close relative playing the games on a regular basis.

Overall, 37% of all adults in Nova Scotia who do not play VL games on a regular basis personally know of someone who they believe is experiencing problems with this type of gambling.

In total, there are only 2.4%, or approximately 15,375 adults in Nova Scotia, who do not play VL games on a regular basis (Non-Regular VL Players), and who report that they are currently living with someone who has, or has had, a VL gambling problem. Almost 20% of these adults are including their own past play of the games and in 25% of the cases, there is more than one Problem Gambler in their households.

Currently approximately 16% of Regular VL Gamblers in NS are characterized as being Problem VL Gamblers. This represents $\approx .92\%$ of adults in the province. Another 9% of Regular VL Gamblers indicate they were Problem VL Gamblers in the past, but have gained control of their play. These players represent approximately 0.51% of the adults in the province. Not all the Problem VL Players living in households in Nova Scotia **are still playing the games**. An additional 1.4% of adults in Nova Scotia have stopped playing VLT's on a regular basis due to either time or money problems with play. **If those adults who had a problem but gained control of their play and have continued to be Regular Players, and those who stopped playing as a result of a self-declared problem with VL play are also included, estimates of problem play, past and present, would reach approximately 2.8%, or approximately 19,100 adults in Nova Scotia. It is not surprising, therefore, that an additional 2.4% of all adults who do not currently play VL games would state either they themselves or someone they live with has had a problem with video lottery gambling.**

Even frequent VL play may be causing household or personal problems for those associated with the player. While the actual player may be involved in personally non-

problematic play, other family or household members may still be finding the amount of time and/or money allocated to the activity as problematic either due to concerns about the player or because of inconveniences or absences associated with their play. Therefore, although only 0.92% of adults in Nova Scotia are currently identified as Problem VL gamblers who are still playing the games, even heavy play may have consequences for other family members.

Estimates of problem VL play based on adults' familiarity with someone outside their own household who has a problem will tend to grossly exaggerate the incidence of Problem Players in the province for two reasons:

1. there will be a tendency to over count, as several people can be aware of one Problem Player;
2. the identification of problem play may be based on hearsay, as opposed to actual behaviour by the individual and, thus, subject to misrepresentation and misinterpretation.

However, having individuals estimate problem VL play by adults outside their immediate households does provide an indication of the extent to which VL play is associated with problems by the general population. It also indicates the magnitude of the impact a small proportion of Problem VL Players may have on adults in general in Nova Scotia.

In total, 9.8% of adults who do not play VLT's on a regular monthly basis believe that one or more people in their households or related to their immediate families (including siblings, parents, grandparents and extended family) have a problem with video lottery gambling. This represents approximately 63,000 adults in Nova Scotia, or approximately 3.3 adults for every estimated Problem VL Player (past self-declared or present) in the province ($63,000 \div 19,100$).

Thirty-one percent (31%) of Non-Regular VL Players ($\approx 198,000$) report having friends or acquaintances who have problems with video lottery gambling. In fact, 84% of these adults who know of someone with a VL problem cite play behaviour by friends and acquaintances. Thus, for the majority of adults, problem play tends to have less direct impact on their personal lives. Given that Regular VL Players tend to have fairly socially active lifestyles and higher involvement with others (especially friends), it may not be surprising that such a large percentage of adults feel that they have friends involved in problem VL play (although, in some cases, frequent play may also be contributing to impressions that individuals are having difficulty with their video lottery gambling).

When all Non-Regular Players in the province who state they personally know of someone with a VL gambling problem are considered (based on past and present problem play levels), it can be estimated that for every current and past Problem VL Gambler in Nova Scotia, approximately 3.3 other adults in the province are directly affected, with an additional 10 adults reporting indirect contact.

Efforts to Control Play (Self and/or Others)

Overall, 6% of all adults (≈40,800) in Nova Scotia have sought assistance or information for help in controlling video lottery play at some time. Primarily, it is the play of others which is motivating adults to seek assistance. Approximately 83% of all those who have sought VL gambling assistance were doing so in an attempt to help others control their play of the machines. Only 1% of adults (≈6,800), or ≈17% of the 40,800 adults seeking problem gambling support, were doing so in order to control their own VL gambling problems. Thus, **it would appear that the majority of those who report accessing problem gambling support and services are friends and relatives of the problem gambler.** This has implications for the delivery of problem gambling information and the coping strategies provided. In particular, 5% of those who have never played VL games (Non-VL Players) have sought assistance for others. Adults with no personal experience of play comprise almost half of all those who have tried to obtain help for someone else's VL gambling problem. For the most part, they will be unfamiliar with player technology and habits and may be unable to provide specific information on play. Educating the individual who is trying to obtain the information on VL play may be part of the necessary service provided by front-line problem gambling workers (service providers).

It is noteworthy that, in general, adults in Nova Scotia are more likely to access formalized services to assist someone else with problem VL gambling (5%) than to go to friends or family members (3%). There is quite often an overlap in the sources accessed. In fact, 66% of those who have sought help through informal avenues (friends/family) have also sought assistance through more formalized services. It may be that friends, family or co-workers encourage those seeking information to contact organizations who they feel will be able to provide more accurate or effective help and/or information. Interestingly, only 41% of those who have contacted formal organizations for assistance for someone else, also have gone to friends, family or informal sources for help.

The results then suggest that only one-third of those who have tried to get information or help on problem VL gambling by speaking to friends or family have not pursued the issue further with formalized service providers. This translates into 1% of all adults in Nova Scotia, or approximately 16% of those seeking help or information on problem VL play. Thus, 84% of those seeking assistance eventually go to organizations outside their friends and family.

In total, 9% of Regular VL Players (≈3,300 adults) have attempted to get help or information on VL gambling. Compared to all other adults in Nova Scotia, Regular VL Players are significantly more likely to report that they seek assistance from informal sources. In fact, they indicate that they tend to access friends and family almost twice as much for help than other outside organizations (7% versus 4%). Approximately 80% of those Regular Players seeking assistance were motivated to do so by their own play, with approximately 55% seeking information/help for other Regular VL Players. This means just over one-third (35%) of Regular VL Players seeking help have done so both for themselves and other players they know. Thus, Regular VL Players will often be a source of information and/or assistance for other players when trying to control or manage their play. The use of formal versus informal gambling support tends to be reversed for Regular VL Players, as compared to the rest of the population; only 35% of those who go to friends or family

for help also reference more formalized services, whereas 64% of those who use formal problem gambling service providers have also gone to friends or family for support. It appears that, in many cases, the players themselves are initiating or motivating efforts by other adults to seek information from formal sources. Overall, 54% of Regular Players who have sought help have exclusively relied on informal sources such as friends and family members versus only 16% who have solely used formal problem gambling services. **This means a total of 84% of all Regular VL Gamblers seeking help go to friends and family for assistance. This underscores the importance of friends and family members in providing information and support to those Regular VL Gamblers experiencing difficulties.**

Aside from a greater tendency for Regular VL Players to go to their spouse/partner or to friends for help, there are no appreciable differences in the percentage of adults in any of the three population segments using specific formal sources for information or assistance.

Church groups, Drug Dependency/Addiction Services and gambling self help groups (Gamblers Anonymous) are all equally likely to be contacted by those experiencing problems, either directly or indirectly, with VL gambling. It is estimated that 2% of adults in Nova Scotia have used each of these services in the past in specific relation to VL play. However, there appears to be a fair amount of overlap in use of these three service providers by Regular Players, whereas other adults are more inclined to use only one of the three. This suggests **that once Regular VL Players have finally undertaken to get assistance from formalized services, they are more motivated to explore all the various support options available.**

A similar proportion have also accessed the Gambling Help Line (1.1%). Specifically, approximately 1% of Regular VL Players seeking information or help with VL play have personally accessed the line at least once in the past. However, as noted for gambling support services in general, the majority of Nova Scotians calling the 1-800 Help Line will be spouses, friends, family members or other adults seeking to assist someone significant in their lives with a VL gambling problem.

PROBLEM VL GAMBLER ANALYSIS

The primary purpose of the Problem VL Gambler Analysis is to identify distinctive characteristics and behaviours of the Regular VL Players who are experiencing difficulties with video lottery gambling, in order to gauge and evaluate the nature and causes of problem play. Regular VL Players were segmented into three groups and a comparison of Infrequent, Frequent, and Problem VL Gamblers was undertaken, to identify possible causes and risk factors associated with problem play, as well as to identify Problem VL Gamblers in the field.

The analysis primarily compares Problem VL Gamblers to Frequent Players of VL games who tend to play as often as the Problem VL Gamblers, but who are not affected negatively by their play. Contrasting these two segments identified differences in characteristics, circumstances and play behaviours; the key factors contributing to problem play.

Identification Of Problem VL Gamblers

Current VL Players were classified as Problem VL Gamblers based on the results of three independent measures:

1. A derived multi-item attitude score of 16+ on 6 key statements associated with problem VL gambling (based on pilot testing);
2. A rating of 5 or higher on a 10-point scale, where 1 means "your" VL play is not at all a serious problem, and 10 means your VL play is a serious problem (self-designated score);
3. Respondent indication they have ever spent more time or money playing VL games than they should, and that the problem is still unresolved or only partially resolved (self-designated score).

Respondents had to qualify on at least two of the three measures before being included in the Problem VL Gamblers segment. There were 105 Regular VL Players who met this nominating criteria. There were twelve respondents who did not qualify on the first two measures, yet stated unequivocally they are currently experiencing problems with their VL play and have not yet resolved the problem. Given these players' perceptions of their VL gambling, it was decided these individuals must be included in the Problem VL Gamblers segment.

The Problem Segment

- **Problem VL Gamblers currently comprise 16% of the Regular Player base.** The two non-problem regular player segments consist of Frequent VL Players (play once a week or more) who make up 38% of Regular Players and Infrequent VL Players (play one to three times a month) who make up 46% of Regular Players.

- **Problem VL Gamblers represent 0.92% of adults in Nova Scotia** or approximately 6,400 adults in any given three-month period.
- **Problem VL Gamblers contribute a major part of the total revenue from VL Gambling, spending \$808.88 per month compared to \$228.50 for Frequent Players and \$53.49 for Infrequent Players.** Problem VL Gamblers account for 53% of the total annual revenue for Video Lottery Gambling in Nova Scotia. On an annual basis, these players spend approximately \$9,706.56 each and collectively contribute approximately \$62 million in VL revenue to the Province.
- While the Problem VL Gambler segment comprises 16% of Regular VL Players in Nova Scotia, **there is an additional 9% of players who indicate they have had problems with their VL gambling in the past, but have subsequently resolved their problem.** This suggests that the majority (75%) of Regular VL Gamblers play the games relatively free of problems. It is likely that some of these respondents may in fact be experiencing problems with their play and were not identified in the survey. Furthermore, the evidence suggests players may move in and out of problems in managing their play at various times. However, **it is reasonable to conclude that the vast majority of Regular Players derive benefit from the entertainment value of the games without suffering any lasting ill effects.**

Environmental Factors

- **Ease of access to the VL machines is likely contributing to problem play.** Compared to Frequent Players, Problem VL Gamblers claim that they feel strong desires to play the games whenever they are near a VL machine (65% versus 26%). As well, the majority (78%) of Problem VL Gamblers support the restriction of VL machines to three or four locations in Nova Scotia, presumably to help them control these urges, as compared to only one-third of other regular players.
- **Product design is likely contributing to problem play** by the Problem VL Gamblers. The products are designed to enhance the illusion of control and the role of skill, which reinforces the Problem VL Gambler's superstitions about VL play. The belief that they can influence the odds of winning the game leads to chasing behaviour, which is a major cause of their VL gambling problem.

Personal Factors

- There are not large skews in the demographic characteristics of the Problem VL Players **when they are compared to other Regular VL Players.** Problem VL Gamblers are not more likely to be unemployed. Their work status and occupation status profiles are very similar to other VL players.
- Compared to other Regular VL Players they are **less** likely to be aged 19 to 24 or over 60 years of age, to be students or homemakers, to be in households with 3 children, to be in

households with five or more persons in them, and to have incomes between \$35,000 and \$45,000 or over \$75,000.

- Compared to other Regular VL Players they are **more** likely to have less than grade nine education, to be aged 50-59, to be living in two adult households with no children, and to be separated/divorce/widowed.
- Most of these demographic segments are small (5% - 14%) and do not cause a large shift in the profile of Problem VL Gamblers compared to the other Regular Players. However, these groups may be particularly vulnerable to problems with VL gambling and may require targeted intervention strategies. The only large segment associated with a greater likelihood of being a Problem VL Gambler are those players living in two adult, no children, households (28%). The largest demographic segment with less chance of being a Problem VL Gamblers are those Regular Players who are 19-24 year olds (20%).
- The life style of Problem VL Gamblers includes **more** passive TV watching than any other segment and includes **less** social interaction with friends and relatives and involvement in hobbies, sports or other interactive activities. Gambling and/or entertainment options like VL games, which are very passive, non-physical and non-social, fit their life style profile very well. **Alternative activities that appeal to a person with this life style profile would have to be identified as viable substitutes for VL gambling.**
- **Problem players are more likely to have incorrect beliefs about the odds of winning when they play.** In particular, they are more likely to believe they can win when they start to play and to believe they are more likely to win after a string of losses. They exhibit superstitious behaviour, which they believe influences their chances of winning (playing machines that haven't paid out recently or playing machines in specific locations). They also believe they are more skilled in the play of the games and, thus, can influence their chances of winning through their ability to control the play of the game.
- **Problem VL Gamblers tend to experience strong physiological, emotional and behavioral responses towards playing VLT's that those in the other player segments do not have.** This suggests their problem is related to a large extent to their individual characteristics. These physiological (heart palpitating, sweaty palms, etc.) and emotional (excitement, anger etc.) responses are symptomatic of the individual's heightened response (arousal level) to the play of the games. This suggests they just can't quit when they should, or even when they run out of money. This inability to stop playing when they know they should is a major contributor to their problem.

Any attempts to reduce problem play will have to address changing the beliefs and actual play behaviours of Problem VL Gamblers, as well as reducing the game's effect on their arousal levels while they play. This suggests focusing attention on a combination of factors contributing to their play behaviours, including the machine/game designs, situational

factors impacting play and the individual's perceptions and motivations. Specifically, efforts should include reducing the perceived value of superstitious behaviour, limiting their perceived ability to influence the outcome of their play, changing perceptions about the odds of winning after a loss, and reducing factors that lead to, and facilitate, chasing of losses.

Situational Factors

- **Problem VL Players are much more likely to go to a VL location directly from home or work with the primary (often sole) purpose of playing VL games.** This means they take enough money for that purpose and they select a location where they know they can play out of sight for an extended period of time. The situation at home is often cited as the trigger for VL gambling as they often play to escape problems at home. Other situations that cause them to play include; when they are not working and have “nothing better to do”; when they feel depressed and play to relieve the depression; and when they are short of cash and hope to pay off bills through their VL winnings. **Dealing with the extraneous situations triggering the VL Gambling response may be the necessary first step to solving the problem at the VL machines.**
- **Another situational factor at home that likely causes problem VL gambling is the presence of another Problem VL Gambler in the household.** If there is a Problem VL Gambler with another regular VL player in the household, there is a 43% chance that the other player is also a Problem VL Gambler. Again, the problem is a household problem and must be dealt with at that level.
- The fact that they go directly to a location to play VL games means **Problem VL Gamblers are more likely to select a location for the quality of its VLT area, not on its other entertainment values** and are therefore less likely to be distracted by, or interested in, other activities that might be less costly at that location.
- **Drinking does not seem to be a major cause of problem play,** and in fact, VL play likely reduces the consumption of alcohol as VL players, in particular Problem VL Gamblers, shun alcohol in order to maintain their concentration on the games and conserve their funds for VL play. *(NOTE: It is unclear in the current study as to the role of alcohol when these individuals are not playing VLT's. This is an area which warrants further study.)*

Social Factors

- **Surprisingly, Problem VL Gamblers frequently play VL games with other players, either on the same machine, or on a nearby machine.** Thus, a positive social atmosphere may contribute to problem play in some cases. However, this may provide an opportunity for intervention if a way can be found to have friends and/or family help the Problem Gambler control their play (e.g., responsible gaming communication strategies similar to those instituted for drinking and driving).

Affinity Toward Gambling In General

- **Problem VL Gamblers are attracted to all forms of gambling and, on average, spend more in total on other forms of gambling than the other player segments (\$109.75 versus \$86.98 for Frequent Players and \$55.87 for Infrequent Players).** In particular, compared to Frequent and Infrequent Players, they are higher spenders on those types of gambling which are non-skill, random outcome games such as lottery tickets (Lotto 6/49, scratch 'n wins) and casino slot machines. Therefore, the availability of a more passive/random forms of gambling has likely had a significant impact on the development of problem play for these adults.
- The Problem Players have relatively high expenditures on casino slot machines (\$29.70 versus \$9.55 for Frequent Players and \$5.87 for Infrequent Players), **suggesting that slot machines would be a potential substitute for many of the Problem Players should current access to VLT's be restricted.**

Identification of Problem VL Gamblers

On-Site Identification

- **The research identified several ways that Problem VL Gamblers can be identified on site.** For example, although they make up only 16% of regular players, Problem VL Gamblers spend much more time playing the games, as compared to those in the other segments (on average, 189 minutes per time versus 30 to 60 minutes for other Regular Players). As a consequence, they are much more likely to be "occupying a stool" in front of a VLT at any given time of the day. In general, they make up at least 48% of those playing the games at any particular time. However, there are some places, days and times when they occupy an even larger proportion (58% or more) of the available machines. Specifically, Problem VL Gamblers are more likely to be found at sports bars, native gambling establishments, or other non-bar type locations (restaurants); at any VL machine on Sunday through Wednesday and; on any day from 10:30 a.m. to 7:00 p.m.
- **At any given time, at any given VL location approximately half of all those adults playing video lottery games will be problem VL gamblers.** It is interesting to note that this fact may be the reason why many people assume that most VL players spend long hours and large amounts of money playing VL games. If "observers" base their opinions on the people they see playing, they are likely to substantially over estimate the percentage of Players having problems.
- **Problem VL Gamblers are also much more likely to exhibit behavioural responses to play that will further aid in identifying them through observation.** Specifically, they make up 76% to 86% of any of the players one may see groaning, kicking a machine, talking to a machine, swearing, cursing or yelling while they play.

In-questionnaire Identification

- **The behavioral, physiological and emotional responses of Problem VL Players tend to be stronger and more frequent than for other Regular Players.** A self-administered survey that asks about these responses would be viewed as non threatening and would likely be answered honestly by most players. A selection of such questions would comprise an effective screen for identifying Problem VL Players, as opposed to the use of more threatening questions commonly administered in existing screens (e.g., SOGS, DSM IV).

The Impacts of Problem VL Gambling

- **Many Problem VL Gamblers have been playing for more than four years (57%)** and have obviously survived thus far. Therefore, the negative effects on them personally, and on their family's lives, may be on-going.
- **Many have incurred some form of debt in the last year.** These players have delayed bill payments (33% in the last year), dipped into savings (23%), used credit cards (21%), sold personal property (11%) and spent mortgage or rent payments (9%). As many as a third have had problems paying back debts they have incurred as a consequence of VL gambling.
- **The play affects them personally with 85% having feelings of guilt and 50% saying they are sometimes depressed.**
- **Over half of Problem VL Gamblers say that VL play affects their relationship with friends and family.** The Problem VL Gamblers have friends and family worrying about them (55%), they spend money on VL gambling that was meant for other purposes (49%), they lie to others about their VL Gambling (48%), they feel anxious and irritable when not playing (27%), and they have trouble sleeping (26%).

Coping Mechanisms

- **Problem VL Gamblers admit that they have very little will power when it comes to stopping their play of VL games.** Approximately three-quarters (76%) have either stopped or tried to stop playing at some time in the past. Setting a budget works upon occasion, however, they will often ignore their budget if they still have money or access to additional funds they can continue to spend. The most successful strategies for controlling their expenditure take away their ability to continue playing for extended periods once they have started to play the machines. These strategies include only bringing a budgeted amount to the location, leaving bank and credit cards at home enlisting the aid of spouses and/or friends and avoiding places that have VL machines.

Problem Gambling Support Services

- **Approximately one-third (34%) of Problem Players have had contact with sources of assistance in the past.** When they sought help, they more often (26%) went to informal sources such as spouses, friends or employees, Fifteen percent (15%) have gone to formal sources such as counseling services, the Gambling Help Line, Gamblers Anonymous or religious organizations. However, 70% of Problem VL Players have tried to stop, or control, their gambling in the last year alone. This suggests that there is considerable opportunity for formal agencies to assist a larger part of the Problem Player population. As well, efforts can be focused on providing the informal sources of help (such as friends and family members) with assistance in helping the Problem Players, or directing Problem Players to the formal agency for assistance.
- **The Non-Problem Player segments account for 78% of those Regular Players who contact sources in order to help others. Conversely, Problem Players comprise 85% of those Regular Players who seek out assistance in order to help reduce or stop their own problem play.** All Regular Players are, therefore, potential targets for assistance, whether to help others or to help themselves. This means that on-site promotion, or intervention, perhaps provided by bar staff or displayed on the VLT machines, would be reaching those most in need of assistance.
- Seeking assistance from friends, family and institutions is not common among those Problem VL Gamblers identified in the study. **When they do seek professional help, they report mixed results from sources such as Gamblers Anonymous and the Gamblers' Help Line.** This is not particularly surprising since the Problem VL Gamblers in the study who have used any gambling support services are obviously still continuing to experience difficulties with their VL gambling. Therefore any assistance they received from the various service providers has had limited or no impact on their VL gambling as yet. Simply by definition those Problem VL Gamblers who have *successfully stopped playing video lottery games* did not participate in the survey of Regular VL Players and, therefore, their responses are not included. While the feedback from those adults who are currently involved in problem VL gambling offers valuable insight to service providers as to areas for improvement or further development, it only provides part of the picture. Through additional research it will be necessary to include the responses of those who have managed to overcome their problem with video lottery gambling in order to adequately assess and evaluate the effectiveness of problem VL gambling interventions and treatment strategies. *(Note: A proposal for a Study of Lapsed Regular VL Players in NS has been submitted for DOH consideration.)*

Overall, the results of the study indicate that 5.7% of adults in Nova Scotia are involved in regular continuous play of video lottery gaming. These adults account for approximately 25% of all those who play VLT's each year in the province and contribute approximately 96% of the annual provincial net revenue for VL gambling.

The majority of Regular VL Gamblers (75%) appear to derive entertainment benefit from VLT play and do not report or manifest any long-term ill effects from VL gambling. However, the results suggest that at least 25% of Regular Players have had difficulties with their VL gambling, with at least one-third having attempted to stop and/or reduce their play levels at some time since they have started playing the machines.

The Problem VL Player segment identified in the current research comprises a distinct group of VL Gamblers in Nova Scotia. This group is strongly differentiated from other regular VL gamblers. Problem VL Gamblers in Nova Scotia presently comprise 16% of all of those who play the machines on a regular basis which translates to approximately 0.92% of all adults in the province. This group of VL Gamblers contributes just over half of the net revenue for video lottery gambling and, at any given time, will comprise almost half of all those sitting in front of a video lottery terminal in Nova Scotia. For the most part, these adults report significant guilt and anxiety, are experiencing difficulties in coping and are at a loss as to how to control their VL gambling.

The results of the Problem VL Gambler Analysis suggest that there will not be any single treatment solution in addressing problem video lottery play. Prevention, intervention and treatment strategies will have to be as varied as the many factors impacting and contributing to problem VL gambling. By focusing on the specific behaviours, perceptions and characteristics of the individual, it may be possible to customize effective treatment approaches on a per problem player basis. The results of the current study can be used as input in designing and testing various models related to VL gambling treatment. Furthermore, the study results suggest that there are opportunities for harm minimization or harm reduction in terms of those adults who have not (yet) developed problems with VL gambling, but who may be at risk for problem play in the future.

The results of the Nova Scotia VL Players' Survey provide a comprehensive overview and profile of video lottery play in the province. A number of viable options in addressing problem VL gambling in Nova Scotia are identified, which can be further explored and tested. However, given the revenue contribution of Problem VL Gamblers, any "solution" may have significant implications for VLT revenues in the province.

1.0 INTRODUCTION

In May, 1991, Nova Scotia was one of the first jurisdictions in North America to undertake the administration/management and control of the video lottery market. By 1996, play of video lottery games accounted for almost \$375 million wagered by Nova Scotians and approximately 54% of the provincial revenue derived from total gambling activities. Video lottery terminals are now available in all provinces, except Ontario and British Columbia, although Ontario is currently preparing to launch its video lottery program. However, to date, there had been no random quantitative studies undertaken by any provincial jurisdiction which specifically examined video lottery players. Consequently, much of what is known about the players and video lottery play habits is based on very small random samples, non-random qualitative studies, anecdotal information or from treatment populations.

Given the vast revenue potential for video lottery gaming, it is an extremely attractive option for financially constrained governments. As video lottery becomes more widespread, the negative consequences of play are also becoming more evident. In the absence of any conclusive information on the association between video lottery play and problem gambling, the public and service providers, on a community level, are struggling to cope with the video lottery issue. Removal or banning of the machines is often viewed as the only reasonable alternative. Prior to May, 1991, and the government operation of video lotteries, the "Grey Market" for the illegal machines was estimated at approximately 1,500 to 2,000, with presumably similar negative consequences for players (although those adults likely comprised a smaller portion of the population). Banning video lottery play may only serve to eliminate social play and drive the problems associated with video lottery gambling underground.

There is a strong need for accurate, reliable information on video lottery play and the factors contributing to problem play. Although currently, on a per capita basis, Nova Scotia tends to be ranked sixth in Canada in terms of the number of terminals per 1,000 residents (3.55), the province still represents one of the most mature and evolved video lottery gaming markets in North America.

In recognition of a need to manage the consequences of having had the machines available over the past seven years, the Nova Scotia Department of Health Problem Gambling Services wished to develop a more concise and extensive profile of VL Players in this province. Specifically, they wanted to determine the profile of problem and non-problem players to develop an understanding of the mechanisms players can use to overcome problem gambling on video lottery terminals, and to develop a list of indicators that can be used for the identification, prevention and treatment of problem video lottery players.

In June, 1997, Focal Research Consultants was commissioned, by the Department of Health, to undertake the first benchmark study of video lottery play in Nova Scotia.

Focal Research has been researching the video lottery market on an on-going basis since 1991, when the first in-depth studies on game adoption by potential players was undertaken in Nova Scotia for the Atlantic Lottery Corporation. Since that time, Focal Research has conducted

numerous qualitative and quantitative studies on the subject and, thus, are able to apply this experience and expertise to developing an understanding of VL play in Nova Scotia.

1.1 Project Objectives

The primary objective of the project was to:

“develop an extensive and comprehensive profile of video lottery players in the province (of Nova Scotia) in terms of playing habits, attitudes and lifestyles” in order to determine:

- ♦ *the proportion of players exhibiting problem VL gambling behaviour;*
- ♦ *demographic/characteristics of VL players and the subset of problem players;*
- ♦ *impacts on life/lifestyle;*
- ♦ *a delineation of the risk indicators that will assist in designing prevention and treatment strategies.*

Given these objectives, the goals of the project are essentially twofold:

1. to provide an extensive/comprehensive profile of **video lottery play** in Nova Scotia;
2. **identify risk factors associated with VL play** for input in designing prevention and treatment strategies.

As the first comprehensive study of VL play undertaken in Nova Scotia, the results also provide a benchmark measure against which VL play and subsequent intervention and harm reduction strategies/programs can be monitored and tracked. Therefore, **it was also necessary to establish a baseline measure of attitudinal, behavioural and psychographical response for total adults in Nova Scotia for comparison to VL Players.** Rigorous standards in terms of data collection and methodology were incorporated into the study design to ensure data accuracy and reliability. In spite of the quality of the data, however, **the relevance of the project and its ultimate effectiveness is driven by the specific information gathered by the survey.**

1.2 Questionnaire Design

The original RFP for the study specified that a key component of the questionnaire would consist of identifying non-problem, problem and pathological gambling through the use of existing gambling screens deemed appropriate by the Department of Health (e.g. lifetime and current SOGS, DSM IV, MAGS).

The RFP also indicated that the development of the survey must “include” but was not “limited” to these measures.

In the proposal for the project, Focal Research acknowledged that, as requested, the questionnaire would be largely comprised of previously designed and tested measures. However, it was also indicated that these surveys would most likely require modifications in order to be effective in **exclusively addressing video lottery play.**

Subsequent review of the existing screens by the Department of Health and Focal Research identified a number of weaknesses associated with their inclusion. In particular, there was significant uncertainty as to the efficacy of adapting current gambling screens to specifically address video lottery gambling (Lesieur and Blume, 1987, 1993; Lesieur, 1994).

Given these concerns, an extensive literature search was undertaken including attendance at the International Gambling and Risk Taking Conference in Montreal (May 31-June 5, 1997). Dr. Henry Lesieur (one of the co-developers of the South Oaks Gambling Screen and co-author of current DSM IV) was contracted as a consultant to the project. In addition, meetings/discussions were conducted with other key researchers currently active in the field of problem gambling including Dr. Mark Dickerson (Australian Institute for Gambling Studies), Dr. Robert Ladouceur (Université de Laval, Canada) and Dr. Sue Fisher (University of Plymouth, UK).

There is considerable controversy regarding the effectiveness of both the SOGS and the DSM IV for use with non-clinical populations (Dickerson, 1993; Volberg, 1996; Walker and Dickerson, 1996; Schaffer et al., 1997). These screens are primarily used to determine prevalence estimates of problem and pathological gambling in a population. The survey questions are long as an addendum and cannot be modified without affecting the instrument's reliability/validity. The information obtained is descriptive rather than actionable and, therefore, it is difficult to translate results for use in treatment strategies. Furthermore, identification of appropriate cut-off points to minimize concerns regarding false positives are unclear and ill-defined at present. There is a consensus that new measures are required to address the concept of problem gambling at large. In particular, efforts are being directed at developing a new measure for use in Canada which can circumvent the problems associated with the general application of clinical screening instruments (Canadian Gambling Prevalence Project). A sub-committee, the Interprovincial Task Force on Problem Gambling, was struck and issued an RFP in June, 1997, asking for the development and testing of a new measurement instrument for problem gambling for use in the general population. Subsequently, the Canadian Centre on Substance Abuse was contracted to conduct this pioneering gambling research. The first exploratory phase of the research project is currently underway.

In on-going discussion with the Department of Health, it was decided that the use of previously specified gambling screens was inappropriate for the current VL project in Nova Scotia. Furthermore, the use of such screens may compromise the ability of the survey to obtain other behavioural and attitudinal data relevant to defined study objectives (due to survey length, repetition of measures and type of information obtained).

Therefore, the questionnaire was specifically designed for the project, incorporating the identification of problem gambling within the context of VL play.

NOTE: The SOGS and/or DSM IV can be administered separately to those survey respondents agreeing to join the on-going VL research panel (n=482). This return to sample methodology can be used to obtain prevalence rates of problem/pathological gambling for comparison against results in other jurisdictions or to address other issues of interest to the DOH as they arise.

Prior to the meeting scheduled July 11, 1997, with the Department of Health, Focal Research developed a model for the questionnaire. Pending receipt of other relevant materials and research from various sources, the draft questionnaire was revised based on the current information available. The revisions also incorporated key information from Michael Walker's book, The Psychology of Gambling, Henry Lesieur's book, The Chase and "Cognitive Constructs" associated with gambling as identified by Dr. Michael Walker and Dr. Robert Ladouceur (1996). In addition, the 24 interviews conducted for the Department of Health by Baseline Research as a follow-up to the Gambling Prevalence Study in Nova Scotia were also reviewed in detail for VL references relevant to the Nova Scotia gaming market.

Dr. Henry Lesieur was instrumental in providing additional insight, as well as relevant background information, research and literature.

Focal Research administered an initial draft of the survey to 11 regular video lottery players who participated in approximately one hour in-depth one-on-one interviews (July 5-9, 1997).

The questionnaire model, a revised version of the questionnaire (DRAFT II), as well as a preliminary listing of attitudinal and lifestyle measures were presented to the Department of Health on July 11, 1997 for evaluation.

The key considerations resulting from this meeting were as follows:

- 1. The questionnaire designed for the project must undergo formalized testing prior to field use to ensure the efficacy of the survey instrument.** As this survey was specifically designed to address the project objectives, the reliability and validity of the measures had not yet been confirmed. This phase included player input to ensure assumptions based on other research sources were relevant to video lottery play.
- 2. Once the survey was designed sufficient pre-test data was required for detailed analysis.** This was used to identify key factors impacting VL play and allow for refinement and reduction of the questionnaire in terms of length and content.
- 3. The time lines for the project were adjusted to maximize response rates, minimize time costs and allow for survey design and pre-testing.** It was believed that conducting the data collection for the project during August would lead to higher respondent attrition (i.e., unavailability due to vacations, summer time activities) and a higher rate of call backs to secure completion. This had implications for response rates (i.e., representativeness of the sample), as well as costing.

Therefore, the field portion of the study was rescheduled to October, 1997. This also allowed for the requisite testing of the questionnaire prior to data collection.

1.3 Survey Design & Pre-Testing

1. Phase One: Qualitative Research - Focus Group Testing of Concepts

In-depth discussion groups with both light to moderate regular VL players (social players) and heavy regular VL players (serious players) were used to gain insight as to the effectiveness of the DRAFT III questionnaire under development.

Participants were asked to complete the questionnaire prior to taking part in discussions regarding the relevance of certain items and evaluation of specific questions during the sessions. The information was used to revise the questionnaire for field testing.

NOTE: *One-on-one interviews (n=8) were also used as a follow-up to explore sensitive issues in greater detail to gain additional insight.*

1. Phase Two - Quantitative Pre-testing - Field Testing of Concepts

A non-random stratified sample of light, moderate and heavy regular VL players was undertaken to test the revised questionnaire resulting from the qualitative testing (DRAFT IV).

This formalized pre-test required a large enough sample size (n=88) to adequately analyze the responses and determine the factors impacting critical study measures. These preliminary interviews were approximately forty-five minutes to one hour in length and allowed for incorporation of some unstructured feedback. Therefore, senior level interviewers conducted the interviews. To minimize the costs associated with sampling this rare population, Focal Research's in-house confidential listing was accessed. In addition, snowball referral sampling was used to facilitate participation rates (having a regular player refer another regular player).

2. Phase Three - Analysis and Final Questionnaire Design

Response frequencies were examined and advanced statistical analysis conducted to refine the measures included in the final questionnaire.

Factor analysis was used to examine factor loadings for the various attitudinal, motivational and lifestyle statements. The additional analysis was exploratory and dictated, to some extent, by survey results. It included: discriminate analysis; correlational analysis; and segmentation analysis. Particular attention was paid to developing and testing a procedure for identifying Problem Players. Five different measures, some based on multi-item measures, were developed and tested to determine validity and reliability, as well as providing an estimate of the incidence of Problem Players in the population which was used to determine the required sample size for the main survey.

The data was also used for on-going exploratory analysis during data collection to assist in development of modeling and segmentation which was applied to final study results. An overview of pre-test results was presented to the Department of Health prior to finalizing the questionnaire.

Dr. Henry Lesieur reviewed the final draft of the survey and offered valuable feedback which was incorporated into final questionnaire design.

3. Phase Four - Interviewer Briefing & Sensitivity Training

Interviewers at Focal Research already participate in a mandatory eighteen hour training session for social and marketing research data collection. While it was emphasized that the interviewers are not trained counselors, it was also recognized that, during the course of the project, they potentially may encounter individuals who are in crisis or distress, due to their video lottery gambling. Staff needed to be adequately prepared, in order to cope emotionally and professionally with respondents without compromising the respondents' trust or the integrity of the data collected.

All project interviewers participated in an intensive two day workshop consisting of:

- sensitivity training provided through the Department of Health Problem Gambling Services and other related gambling service providers, in order to:
 - enhance the information gathered by the front-line interviewers;
 - familiarize interviewers with gambling issues and problems;
 - provide interviewers with greater sensitivity towards respondents;
 - ensure appropriate coping mechanisms, if the interviewers encounter someone in crisis or distress;
- data collection briefing including sample instruction, household screen and questionnaire design, role playing and discussion;
- familiarity with problem gambling referrals and supplementary services (1-800 Gambling Help Line, Crisis Intervention programs).

The dedication and professionalism of the interviewers who collected the information for this study has made an invaluable contribution to the understanding of video lottery gambling.

1.4 Research Design

To address the objectives of the study, two independent surveys were conducted by telephone with randomly selected adults in Nova Scotia:

1. VL Players Survey (n=711)
2. General Population Survey (n=400)

VL Player Survey:

The VL Players' Survey was conducted by telephone with 711 randomly selected adults in Nova Scotia who, based on their play behaviour over the past three months, played video lottery games at least once a month or more. Data collection for the study took place from October 12, 1997, to January 19, 1998 (interviews were suspended over the holiday season (December 18 to January 2/98) to avoid compromising response rates for the project).

During data collection, a random sample of 11,691 households in Nova Scotia were initially contacted for participation in a household screening survey. The Household Screen consisted of a brief five-minute survey which identified the total number of adults (19+ years) in the household and, for each adult household member, past involvement in four broad gaming activities, including video lottery. Those who had ever played VL games were further screened for regular, or past regular, playing patterns with those playing, on average, once a month or more referred to the Players' Survey. A list of lapsed regular players was also compiled at this time for future research consideration (n=197). Each household member was screened individually, as it was found that one adult was not necessarily aware of another household member's involvement in video lottery play.

Of the 11,691 households sampled, a total of 9,339 households and 18,650 adults in Nova Scotia were successfully screened, yielding a response rate of 79.9% for the Household Screen. Within this sample, 927 Regular VL Players were identified and 711 (76.7% of all those qualified) completed the VL Players' Survey. The overall response rate for the survey was 61.3%. This means that approximately 61.3% of all Regular Video Lottery Players in the original 11,691 households, randomly sampled, successfully completed the questionnaire. Thus, the results of the study are considered representative and are generalizable to the population. While it is recognized that the sampling procedure for the project excludes those adults in institutions and transient or homeless adults, according to Statistics Canada 1997 estimates, 98.3% of Nova Scotians currently live in private households. It can be assumed that those adults living in households differ significantly from transient, institutionalized adults or those who are not living in households. Therefore, these adults should be examined using a separate and more appropriate survey approach which is beyond the scope of this current study.

The VL Player interviews ranged from thirty minutes to two hours, with an average of approximately forty-eight minutes in length. There was only one refusal in progress. In order to maximize participation rates and enhance the accuracy and honesty of the information collected, the surveys were conducted at the convenience of the respondent (e.g., Sunday morning when a spouse was at church, 6:00 a.m. when a spouse/partner was working back-shift, or repeated

callbacks to ensure the respondent had sufficient privacy and time to complete the survey). On average, there were 76 calls placed per completed survey (including completing the household screen), for a total of approximately 54,036 calls. Upon completion of the survey, 482 Regular Players (68%) agreed to join Focal Research Consultants Ltd.'s confidential research panel for on-going study related to video lottery play.

General Population Survey:

The General Population Survey was conducted with 400 randomly sampled adults in Nova Scotia, from November 20 to December 6, 1997, with a response rate of 61.1%.

The interviews ranged from 13 to 29 minutes, with an average length of 17.8 minutes.

Prior to analysis, the incidence levels of VL play for adults obtained in the two samples were compared.

	Household Screen (n=18,650)	Gen. Population Survey (n=400)
Incidence of Regular VL Play (on average 1+ per month)	5.0%	5.73%
Incidence of Trial (ever played VL)	40.5%	38.5%
Incidence of Non-VL Players	59.5%	61.5%

There were no significant differences between the two samples in terms of estimating the percentage of adults involved in video lottery play in Nova Scotia. This finding was compelling since different sampling techniques were employed (see Section 1.5 - Sampling) and, thus, provided convergent validity for the estimate of VL play activity by adults in Nova Scotia.

In order to profile VL play within the context of all adults in Nova Scotia, the two samples were weighted based on the results from the General Population Survey and combined prior to analysis.

1.5 Sampling

Given the project objectives, **sampling was a key component** of the study and has contributed substantially to the representativeness of the results. This is particularly critical, as the survey results establish benchmark measures for video lottery gaming in Nova Scotia, and will be used for input in the development of programs designed to address problems associated with video lottery gaming in the province.

1.5.1 Sample Considerations

Generating A Random Sample Of Households

In determining incidence levels, sampling was initially based on a random sample of households in Nova Scotia. Household samples are generated from the current listings for all residential telephone numbers published by Maritime Tel & Tel (MT&T).

Focal Research used *rotational systematic random sampling* in generating a sampling frame. This means the combined listings (i.e., total population of elements) are randomly sampled a minimum of three times through. This ensures that all elements in the population (i.e., listing) have an equal probability of being selected regardless of the response rate or completion rate for the sample. For example, if a higher response rate is obtained or the incidence of qualified respondents differs from study assumptions and the telephone listings were only sampled once through the combined directories, those adults living in particular areas of Nova Scotia and/or whose name started with a letter earlier in the alphabet would be more likely to be selected for participation.

The primary limitation of this approach is the exclusion of unlisted telephone numbers. It is estimated that approximately 1.85% of residential telephone numbers in Nova Scotia are unlisted (source: MT&T, 1998). While *Random Digit Dialing* incorporates these unlisted numbers into the sampling frame, it also includes non-residential numbers (i.e., business, fax, emergency and vacant lines), which increases the proportion of non-eligible numbers in the sample. Primary concerns associated with Random Digit Dialing sampling technique include:

- ♦ *the introduction of an additional step in the sampling procedure*, as the initial contact on the overall sample is used to define parameters of the actual sample of potentially eligible respondents for the study. This is costly in terms of time and budgetary resources, particularly when further screening for a rare population is introduced once the general residential sample has been defined;
- ♦ *it is difficult to manage response rates and incidence levels* as surveys are typically completed on an on-going basis, as eligible respondents are identified rather than after the sample of eligible respondents has been defined. Determining the percentage of eligible respondents on the sample who have actually participated in the study versus those eligible respondents on the sample who have not taken part (i.e., response rate) indicates how representative the sample and, thus, the study results are regarding the underlying population being examined;
- ♦ *introduces a nuisance factor and erodes respondent goodwill* by contacting emergency services/lines, businesses and unlisted numbers which are typically unlisted to avoid unsolicited contacts. Given the large sample required for the study ($\approx 14,000$ numbers), the ramifications of this approach would be fairly far reaching.

Therefore, the inclusion of approximately 1.85% of the residential population with unlisted numbers is offset by the considerable costs and extensive management efforts required to ensure a representative sample.

Generating A Random Sample For The General Population Survey

Once the sampling frame had been selected, each household on the sample was then further screened to randomize the selection of adults within the household. According to Statistics Canada data (source: Financial Post Canadian Markets 1996), on average, there are approximately 2.0 adults per household in Nova Scotia, with approximately 75% of households representing census families. To ensure a random sample of Nova Scotian adults, participant qualification was based on the selection of a male respondent 19 years of age or older, if the telephone number ends in an odd digit and the selection of a female respondent (19 years of age or older), if the telephone number ends in an even digit. This methodology is superior to other methods of random selection within households such as ***asking for the individual whose birthday is next*** or ***randomly selecting from all adults in each household*** for the following reasons:

- ♦ ***controls for self-selection bias***, as participant selection is based on an independent verifiable parameter (telephone number) rather than a respondent's answer. This also eliminates interviewer judgement/biasing in completing a survey with an ineligible respondent in order to meet project time constraints or quotas;
- ♦ ***ensures a random sample of men and women without instituting non-random quota sampling***, as women are more likely to answer the telephone and, typically, are more inclined to agree to participate in the interviewing process;
- ♦ ***controls for over-sampling of single-adult households***, which represents approximately 10% to 13% of Nova Scotia adults, but approximately 25% of households. If the designated gender for selection (i.e., male or female adult) does not reside in the household, the call is terminated; while if "next birthday" selection or random selection is used, the adult in a lone-person/adult household is always selected, which can inflate the incidence of participation by this group to 20% or more of a particular sample. As single-adult households differ significantly from multi-adult households in terms of behaviour and attitudes, over-sampling this group can have a significant impact on results.

Introducing ***quota sampling*** can offset this bias, however, the representativeness of the resulting sample can only be determined if each quota group is randomly sampled within and response rates are calculated for each group. This necessitates conducting a separate sample for each quota group which substantially increases project time costs. If ***probability quota sampling*** is not used, the resulting sample simply represents a ***convenience or non-probability sample*** which may be reasonable for exploratory designs in which the emphasis is on generating ideas (i.e., focus groups). However, the problem with convenience samples is there is no way of determining whether or not it is representative of the underlying or target population, "*although there is temptation to conclude that large samples, even though selected conveniently, are representative...which they are not.*" (Gilbert Churchill, Marketing Research Methodological Foundations, 1987)

One drawback of the rotational systematic random sampling used for the General Population Survey is an under-representation of young adults (≈ 19 to 24 years) in the population. Adults

19 to 24 years have a greater tendency to be living in households with two or more other adult members (58% versus 21%) (either living at home with parents or living with roommates). On average, those aged 19 to 24 have 2.9 adult household members versus 2.0 for adults 25 years or older. As a result, random sampling of adults by household tends to underestimate the incidence of young adults in the population by approximately one-third (those aged 19 - 24 account for only 6.4% of adults on the sample, although they represent approximately 11% of the population in Nova Scotia. However, in the VL Players' Survey, all adults in each household were screened and, therefore, this bias is not introduced for young adults who are regular players.

1.5.2 Sampling Design For The Video Lottery Players' Study

To assist in defining sampling procedure for the VL Players' Survey, a series of questions was inserted into Focal Research's provincial omnibus (Provincial Pulse). The study was conducted with 200 randomly sampled adults in Nova Scotia one week prior to the proposal submission (April 15 - 21/97), with a response rate of 64%.

Based on the results of this survey, as well as results presented in the Nova Scotia Gaming Control Commission's First Annual Report (1995 - 1996), the following key information was determined:

- ♦ approximately 8% ($\pm 2.2\%$) of adults in Nova Scotia play video lottery games on a regular basis of once a month or more;
- ♦ approximately 31% of those households with one regular video lottery player also have at least one other adult who plays video lottery games on a regular monthly basis;
- ♦ gender is associated with regular video lottery play, with males almost twice as likely to be regular video lottery players than women and, thus, accounting for almost two-thirds of those who currently play video lottery games on a regular basis (63%).

These key considerations for sample design indicate that **obtaining a sample of video lottery players based on a random sample of adults is inappropriate for the proposed study as:**

1. It underestimates the impact of video lottery play on household behaviour and attitudes;
2. The resulting sample of video lottery players under-represents the actual incidence of regular video lottery play in the market such that only approximately 40% (or less) of qualified video lottery players will be included in the analysis due to sample selection.

It was, therefore, concluded that all members of a sampled household who are video lottery players should be surveyed. This would provide a more accurate profile of video lottery players and permit additional analysis at the household level at some time in the future.

MULTI-STAGE SAMPLING PROCEDURE:

STAGE 1: Generate a random sample of households from current telephone listings.

- STAGE 2: Screening of all household members in each randomly selected household to identify regular video lottery players, 19 years of age or older; and lapsed regular video lottery players, 19 years of age or older.
- STAGE 3: Conduct VL Players' Survey with those Regular VL Players identified in each randomly selected household (n=800).
- STAGE 4: Generate listing of lapsed regular video lottery players (problem-related lapsed players) for potential use in future analysis.

NOTE: *Stages 2 and 3 were conducted concurrently, as the estimated incidence level of qualified respondents (regular video lottery players) was known (≈8% of adults) and, therefore, could be randomly sampled to obtain the desired sample size.*

1.5.3 Supervisory & Sampling Control

All surveys were fully supervised and conducted from Focal Research Consultants' centralized data collection facility.

Focal Research operates a minimum of two supervisors per quantitative shift to ensure sample management, data monitoring and easily accessible staff assistance.

All surveys were **100% edited** for accuracy and completeness by the supervisors following completion. Any surveys with errors or omissions were returned immediately to staff to recontact the respondent. Any responses (i.e., open-ended, or close-ended) requiring clarification are recontacted by supervisory staff to ensure comprehension for data analysis.

Random quality control checks were conducted on an on-going basis throughout the study for all completed surveys. The supervisors **recontacted** 10% to 15% of each interviewer's surveys to verify key data points and to ensure that respondents had a positive experience with the interview process. This information is maintained on file and available for review.

1.6 Coding & Data Entry

1.6.1 Coding

The verbatim responses for all summary tables and open-ended responses were recorded from the commencement of data collection. Once 20% of all surveys had been completed (i.e., ≈160 surveys), the responses were analyzed and grouped into relevant segments. Coding mastersheets were developed and verbatim responses were entered under the designated or assigned code. A complete listing of coding and verbatim responses are included in Appendix E. The verbatim responses were used during analysis to provide insight as to the response for general codes.

Coding mastersheets were reviewed daily by the data manager to monitor verbatim assignments. In addition, an on-going random 10% to 15% quality control check was performed on all coding assignments.

1.6.2 Data Entry

All data entry was conducted by technical support staff and managed by the Data Manager/Analyst.

The data was entered using a data entry program customized for the specific study using SYSTAT.

Data entry was performed concurrently with data collection to allow for preliminary data checks/reviews.

Random quality control checks were conducted on 10% to 15% of entered surveys. In addition, the data was submitted to customized data cleaning programs which incorporate logic checks, as well as out of range value checks. Any problems detected were traced back to the respondent survey for corrective action. The data can be exported to various other applications, including SPSS, dBase, or worksheet formats.

1.7 Report Objectives

1) Overview of VL Play in Nova Scotia - Section 2.0

A) Profile of the incidence of VL play in Nova Scotia in terms of:

- trial (ever played);
- casual play;
- regular VL play;
- lapsed regular play.

B) Total Population Segmentation Analysis

➤ Profile video lottery play in the context of a) Non-VL Players; b) Casual VL Players; c) Regular VL Players in Nova Scotia, their lifestyles and gambling/gaming habits including:

- who they are (demographics);
- their lifestyles (involvement in work, leisure activities, socializing, community involvement);
- their involvement in gaming/gambling activities (trial, regular play, expenditure levels);
- impact of video lottery gambling (exposure to VLT's, personal play, play by household members, awareness of problem players, use of problem gambling support services).

2) Regular VL Player Segmentation Analysis - Section 3.0

➤ Profile a) Infrequent; b) Frequent Non-Problem; c) Problem; Video Lottery Players; their lifestyles and their play habits, including:

- who they are (demographics);
- their lifestyles (hours spent playing, time of day, occasions for play, on the road versus at home, socialization profile);
- their play behaviours and experiences (frequency of play, length of play, preferred games, betting strategies/levels, quitting rules, expenditure levels, number and nature of locations where they play, single or group play, social or solitary settings, biggest wins, biggest losses);
- their attitudes toward video lottery play (perceptions of winning, motivations to play, belief in a "system", preference for video lottery compared to other games of chance, likelihood they will become "addicted" or spend too much, belief that they are spending too much or not, attitudes toward government control of video lottery, alternative activities if not playing video lottery, particularly gambling activities, etc.).

➤ Identify and profile problem gamblers who play video lottery games regularly, their play habits, the effect of play on their lives (and others).

➤ Identify risk indicators that might identify players who have, or potentially will have, problems in their lives due to video lottery play.

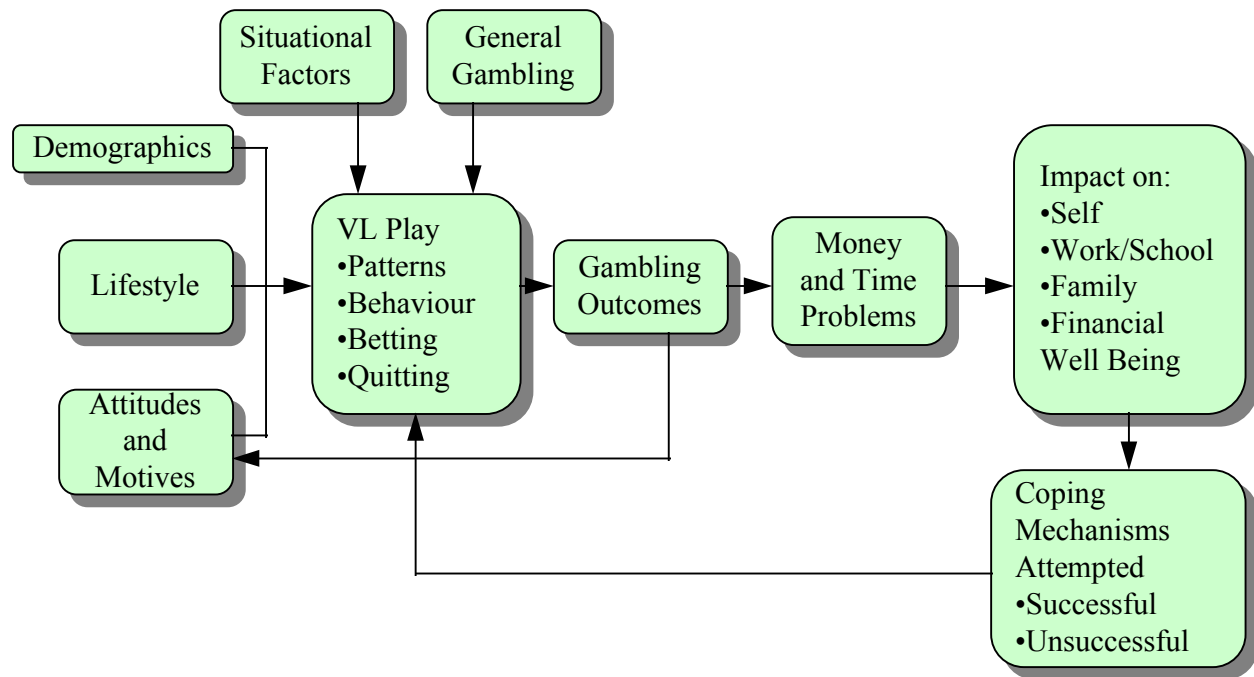
➤ Identify environmental and situational factors, player characteristics and control mechanisms that lead to problem resolution for those who have had problems because of video lottery gambling.

The Department of Health wishes to identify successful strategies for problem resolution, those who are likely to use these strategies, and under what conditions they are likely to succeed. The

Video Lottery Gambling Problem Resolution Model (Exhibit 1) describes what Focal Research believes are the key elements of this aspect of video lottery play. This model was developed for use in questionnaire design and hypothesis testing.

Exhibit 1

Model of VL Problem Play



1.8 Analysis

The data was analyzed for all adults at a total provincial level and within the Regular VL Player base. To obtain figures for in-depth analysis for the total Provincial Overview, the data for the General Population Survey (n=400) and Regular VL Players' Survey (n=711) were weighted and combined.

The weighting was based on the incidence of Non-VL Players (61.5%; n=246), Casual VL Players (31.8%, n=131) and Regular VL Players (5.7%; n=23), as identified in the General Population Survey. These incidence levels were verified by the results of the Household Screen (n=9,339). It will be recalled that the Household Screen was used to determine video lottery play status for adults in Nova Scotia (n=18,650), in order to generate a random sample of Regular Video Lottery Players for participation in the VL Players' Survey.

In order to conduct within segment analysis at a provincial level, the 23 Regular VL Players identified in the General Population Survey were excluded from the combined sample and replaced by those participating in the Regular VL Players' Survey (n=711).

1.8.1 Confidence Intervals (Margins of Error)

The following table presents the confidence intervals (i.e., margins of error) for the results of each sample and each player subsegment. The figures are based upon a confidence level of 90%, meaning the study results will not vary from actual population figures by more than the designated \pm percentage, nine out of ten times the population is sampled. It should be noted that the margin of error is largest when responses fall around 50% since the variance of the estimates is highest at this point. As fewer or more respondents indicate a response, due to lower variance as the proportion estimates approach very low or very high values (e.g., 10% or 90%), the margin of error will be smaller.

Confidence Intervals/Margins Of Error For Each Sample

	Population (NS Adults 19+)	Sample Size	Confidence Interval at 90% Confidence Level				
			10%/90%	20%/80%	30%/70%	40%/60%	50%/50%
Household Screen	679,500	18,650	$\pm 0.36\%$	$\pm 0.47\%$	$\pm 0.54\%$	$\pm 0.58\%$	$\pm 0.59\%$
General Population Survey	679,500	400	$\pm 2.5\%$	$\pm 3.3\%$	$\pm 3.8\%$	$\pm 4.0\%$	$\pm 4.1\%$
Regular VL Players' Survey	$\approx 38,750$	711	$\pm 1.8\%$	$\pm 2.4\%$	$\pm 2.8\%$	$\pm 3.0\%$	$\pm 3.1\%$
Population Subsegments:							
Non-VL Players	$\approx 418,100$	246	$\pm 3.1\%$	$\pm 4.2\%$	$\pm 4.8\%$	$\pm 5.1\%$	$\pm 5.2\%$
Casual VL Players	$\approx 216,200$	131	$\pm 4.3\%$	$\pm 5.7\%$	$\pm 6.6\%$	$\pm 7.0\%$	$\pm 7.2\%$
Regular VL Players Subsegments:							
Infrequent VL Players	$\approx 17,700$	327	$\pm 2.7\%$	$\pm 3.6\%$	$\pm 4.1\%$	$\pm 4.4\%$	$\pm 4.5\%$
Frequent VL Players	$\approx 14,600$	267	$\pm 3.0\%$	$\pm 4.0\%$	$\pm 4.6\%$	$\pm 4.9\%$	$\pm 5.0\%$
Problem VL Players	$\approx 6,400$	117	$\pm 4.5\%$	$\pm 6.0\%$	$\pm 6.9\%$	$\pm 7.4\%$	$\pm 7.5\%$

All reported differences are significant at the 90%+ confidence level ($p < 0.10$) unless otherwise specified. Due to the exploratory nature of the research, and the need to minimize Type 2 as well as Type 1 errors, a minimum confidence level of 90% was considered reasonable:

- Type 1 error refers to the probability of rejecting the null hypothesis when it should be accepted, that is, concluding that two values are significantly different when, in fact, they are the same.
- Type 2 error refers to the probability of failing to reject the null hypothesis when it should be rejected, that is, concluding that two values are not significantly different when, in fact, they are.¹

1.8.2 Tests Of Significance

Mann-Whitney U tests of significance were used for testing medians. Z-tests (two-tailed unless otherwise specified) and Chi Square tests were conducted for all between group differences. Pearson Correlation analysis was used for interval level data correlations, while Spearman Correlations were used for rank ordered data.

It is noteworthy that, while a minimum 90%+ confidence level was adopted for reporting significant differences, this criterion was based on two-tailed tests of significance. For hypothesis testing, where the direction of the difference between groups is hypothesized, the reported differences are actually significant at the 95%+ confidence level ($p < 0.05$).

1.8.3 Principal Measures For Segmentation Analysis

There are three principal measures used for comparison among the segments to examine VL play and related activities, attitudes and behaviours:

- Profile;
- Penetration;
- Continued Adoption.

➤ Profile

- **identifies the percentage within each VL population segment which exhibits a particular response or characteristic (within each VL population segment, the sum over the responses or characteristics will equal 100%). This allows users to determine what a particular segment “looks like” and what the principal characteristics of the individuals comprising the segment are (e.g., 62% of Regular VL Players are male).**

Example:

¹ CHURCHILL, GA, Marketing Research: Methodological Foundations - Fourth Edition, University of Wisconsin, Dryden Press, 1987, p. 635-637, 640-646

Demographic Profile of VL Population Segments

	Total Adults (n=1088)	Non-VL Players (n=246)	Casual VL Players (n=131)	Regular VL Players (n=711)
% of Population	100%	61.5%	32.8%	5.7%
Gender:				
Males	48%	41%	58%	62%
Females	52%	59%	42%	38%
(Total)	(100%)	(100%)	(100%)	(100%)

■ - denotes significant differences at the 90%+ confidence level among VL population segments.

- 48% of adults in Nova Scotia are male;
- 41% of Non-VL Players are male;
- 58% of Casual VL Players are male;
- 62% of Regular VL Players are male;
- the incidence of males for Casual (58%) and Regular Players (62%) is significantly higher than for Non-VL Players (41%);
- conversely, the incidence of females is lower for those who have ever played VL games (Casual Players: 42%; Regular Players: 38%) than for Non-VL Players (59%).

➤ Penetration:

- identifies the percentage of adults within each category who fall in each of the VL population segments (within each category, the sum over the three VL population segments will equal 100%). This allows users to identify which segments in the population are responding most strongly to the games, regardless of their relative size in the market. For example, a particular group of adults may only comprise a small proportion of all adults in the province (e.g., unemployed, retired, students), but within this group, regular VL play may be higher than for other adults.

Example:

Market Penetration Of VL Play By Demographic Category

	Total Population (n=1088)	Non-VL Players (n=246)	Casual VL Players (n=131)	Regular VL Players (n=711)	Total
% of Population	100%	61.5%	32.8%	5.7%	100%
Gender:					
Males	48%	53%	40%	7%	100%
Females	52%	69%	26%	4%	100%

■ - denotes differences among demographic categories significant at the 90%+ confidence level.

- 53% of all males in Nova Scotia are Non-VL Players;
- 40% of all males in Nova Scotia are Casual VL Players;
- 7% of all males in Nova Scotia are Regular VL Players;
- males are significantly more likely than females to be Regular VL Players (7% versus 4%) or Casual VL Players (40% versus 26%);

- females are significantly more likely than males to be Non-VL Players (69% versus 53%).
- **Continued Adoption of VL Play is a derived measure which represents the percentage of adults (within a given segment) who take up regular play after trying the games. Given the distribution strategies for video lottery, certain segments are more likely to be exposed to play and, thus, will comprise a larger proportion of players by virtue of greater accessibility rather than an actual preference or vulnerability to the game (e.g., males comprise 62% of all VL players versus 38% for females). The continued adoption rate of VL play within each segment (percentage of trial players who continue to play on a regular basis) is an important measure because it eliminates any bias due to the number of adults who have tried the games (i.e., men are more likely to play than women because they are more likely to be in locations that have VLT's) and generates a relative value for comparison across the various sub-segments in a population. (Once they have tried VL games, men and women are equally likely to take up regular play.) Thus, continued adoption measures are extremely effective in identifying those groups which are at greater risk to be involved in more regular, frequent play, although they may account for a relatively smaller portion of Regular Players.**

Example:

Males

- 48% of the population;
- 47% have tried VLT's;
- 7% are Regular VL Players;
- 62% of Regular VL Players are male;
- continued adoption rate for VL games = 16%

Females

- 52% of the population;
- 31% have tried VLT's;
- 4% are Regular VL Players;
- 38% of Regular VL Players are female;
- continued adoption rate for VL games = 14%

Conclusion: Despite the fact women are less likely to have tried VL gaming (31% versus 47%), and comprise fewer of the Regular VL Players (38% versus 62%), they are just as likely as men to adopt regular playing patterns once they have tried the games (14% versus 16%).



The data tables are presented in the Appendices for reference purposes:

- Appendix C: Section 2.0 - Provincial Overview Data Tables
- Appendix D: Section 3.0 - Problem VL Gambler Analysis Data Tables

2.0 OVERVIEW OF VIDEO LOTTERY PLAY IN NOVA SCOTIA

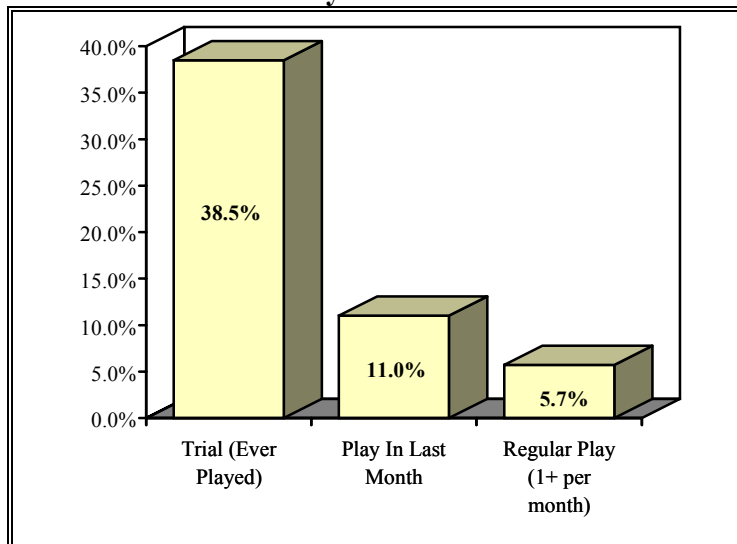
A general overview of VL play is presented in Section 2.1 in order to examine and identify response towards video lottery within the context of the total adult population in Nova Scotia.

2.1 General Play Of VL Games In Nova Scotia

The results of the General Population Survey and the Regular VL Players Survey were weighted and combined prior to analyses. The following section provides an overview of current video lottery playing patterns for adults in Nova Scotia in order to position the video lottery gambling within the context of all adults in the province. (The analysis at a total provincial level is used to segment the population into three distinct groups for comparative analysis in Sections 2.2 to 2.7; Non-VL Players, Casual VL Players and Regular VL Players.)

2.1.1 Current Play Patterns

Incidence of VL Play For Adults in Nova Scotia



Approximately 38.5% of all Nova Scotians ($\approx 262,000$ adults) have **tried** video lottery games at some time in the past. There are 11% ($\approx 75,000$) who **have played in the last month** (prior to data collection), with **approximately 5.7% of all adults in the province characterized as regular players** ($\approx 39,000$ who played VL games once a month or more, on average, in the last three months).

The percentage of adults in the population who are identified as Regular VL Players tends to be

lower than previous estimates obtained from other studies in Nova Scotia (5.7% versus $\approx 8\%$ - 10%). Measures of video lottery gambling, historically, have been included in studies which, initially, had been designed to measure other regulated gambling activities. It appears that video lottery play is very different from other gambling activities such as lottery draws, bingo, cards for money and sports betting which are most often tied to specific play times or regular schedules and/or accessibility to play. These factors directly influence play levels and exert some control on play. Video lottery gambling, however, is continuous, accessible and the schedule of play, for the most part, is self-imposed with no definable start/finish time for play within the prescribed hours of operations for licensed establishments in Nova Scotia. It is, therefore, possible for adults to undertake binge play of the games (play heavily on a sporadic basis), with breaks or stops in between those times when they do play frequently. This “irregular” regular play is often a consequence of extraneous factors interrupting play (e.g.,

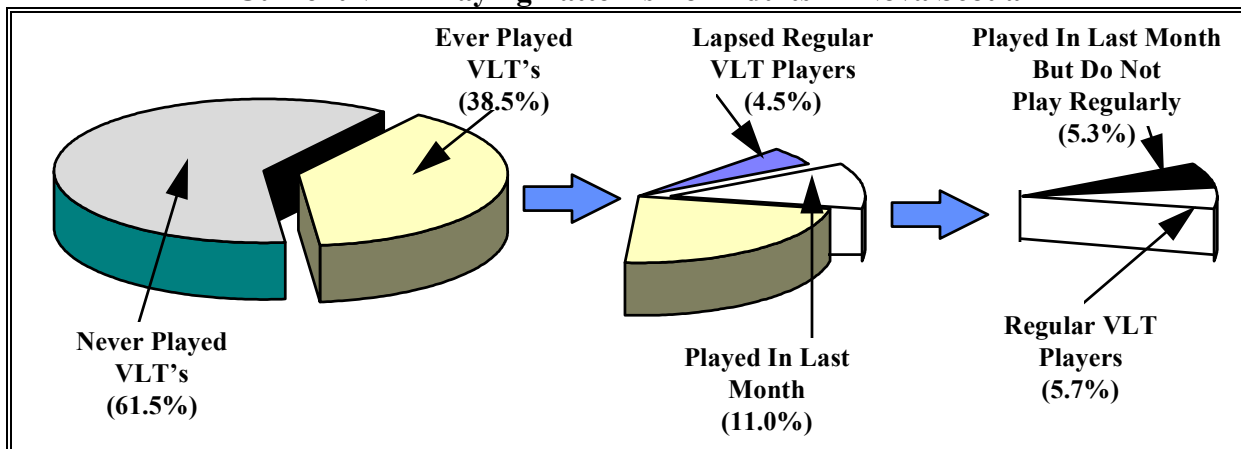
travel, other activities/events) or is deliberately imposed in attempts to control or manage their VL play.

Defining regular VL play based on those adults who have played in the last month, or tend to play once a month or more, on average, will tend to over-estimate the less frequent, social players (and consequently the percentage of adults playing VL games on a regular monthly basis) and under-estimate the impact of frequent, heavy or binge VL players. Furthermore, restricting play definition to average weekly activity will further skew sampling for the same reasons, as there is no more reason to assume a regular weekly schedule for VL play, although some players may indeed play on a weekly basis.

To ensure the sample of Regular VL Players obtained in the current study was representative of those adults involved in continuous, regular play of the games, estimates of play behaviour were based on actual play over the past three months. This allowed adults to refer to specific recent behaviour rather than project estimates of play over an extended, unspecified time period. Those adults who, over the three months preceding data collection, had played VLT games at least once per month, or were involved in irregular, binge play of the games (i.e., 10 times one month, 0 times next month, 12 times last month), were identified as Regular Players and included in the Players' Survey.

It is noteworthy that net revenue estimates for VLT's in Nova Scotia, based on the projected contribution from both Casual and Regular VL Players as identified in the current study, are within approximately 2.5% of actual VL revenue in Nova Scotia suggesting this methodology results in a highly representative overview of adults' response towards VL gambling in Nova Scotia (see Section 2.5 for Expenditure analysis).

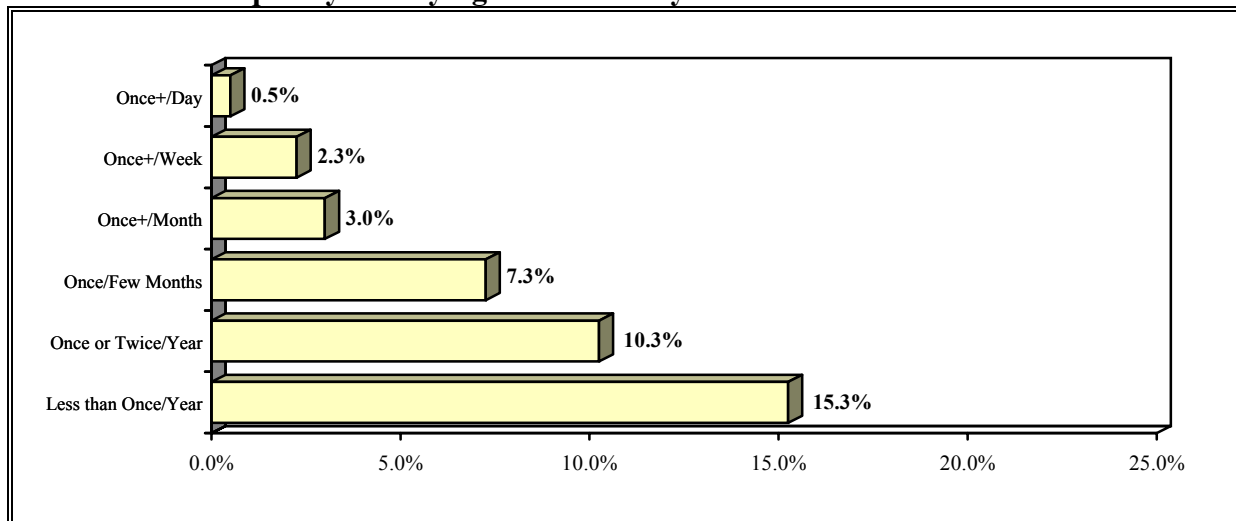
Current VLT Playing Patterns For Adults In Nova Scotia



In terms of adoption (i.e., of those who try the games, the percentage who continue to play), of the 38.5% of Nova Scotians who have ever tried VL games, 28.6% continued to do so in the last month, and only 14.9% of these trial players have adopted regular playing patterns. Therefore, it can be estimated that, in general, 15% of all those who have tried VLT's in Nova Scotia are presently Regular Players.

☞ **Frequency Of Video Lottery Play:**

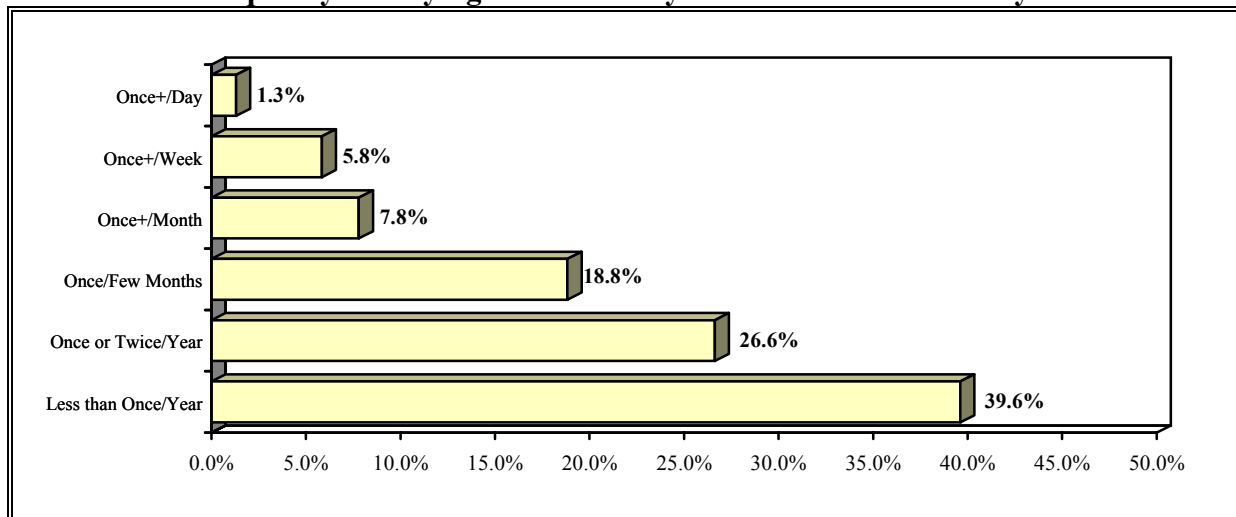
Frequency of Playing Video Lottery Games for Total NS Adults



NOTE: Due to rounding, amounts may vary from total percentages reported in the text.

As previously noted, approximately 5.7% of adults in the province play video lottery games once a month or more. Less than one percent (0.5% or $\approx 3,400$ adults) play on a daily basis, approximately 2.3% ($\approx 15,000$ adults) play weekly and another 3% ($\approx 20,000$) play VL games on a monthly basis. The remaining Nova Scotians who have tried VL games are more casual players, who play once every few months (7%), once or twice a year (10%) or less often than once a year (15%). These casual VL players comprise approximately one-third of adults in Nova Scotia (32.8% or $\approx 222,900$).

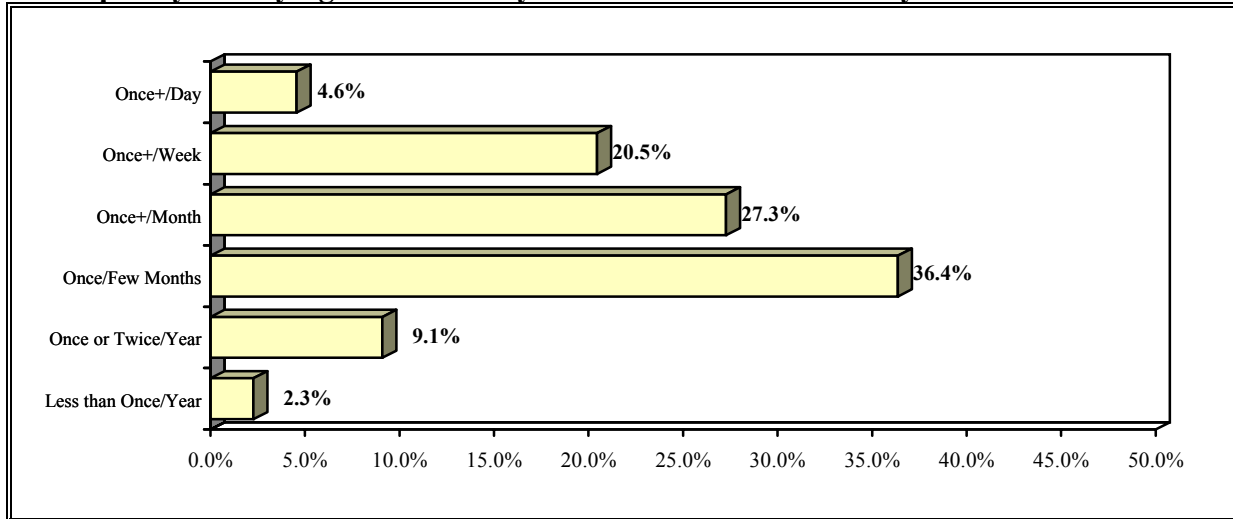
Frequency of Playing Video Lottery Games for Trial VL Players



Considering only those Nova Scotians who have tried VL games in the past, collectively, approximately 15% play either on a monthly (8%), weekly (6%) or daily basis (1%). Two-thirds of these trial players usually play the machines only once or twice per year (27%) or less often

(40%). Thus, the majority (67%) of those who have tried VL games do not adopt regular playing patterns and, for the most part, are unlikely to have even played the games in the last year.

Frequency of Playing Video Lottery Games for Those Who Played In The Last Month



As might be expected, Nova Scotians who played VL games during the month prior to data collection for the General Population survey tend to play on a more frequent basis, but nearly half ($\approx 48\%$) of these players *usually* play only every few months (36%), once or twice per year (9%) or less than once per year (2%). **Therefore, estimating regular monthly play based on behaviour in the last month will tend to overestimate the percent of the population who are typically playing VLT's.** In fact, in a given month, only half of those adults who have played VL games do so on a continual basis while the other half tend to play on only a casual basis. These casual players represent a distinct player group who play less often, play for different reasons and spend significantly less when they do play. Thus, while casual players may account for half of the adults who have played in the last month, they will only represent a very small proportion of those actually playing the machines at any given time, and contribute a minimal portion of monthly VL revenues. This has implications for projecting results to the population, particularly when estimating gaming revenues and regular player behaviour.

For example, on average, **those casual players who played in the last month spent approximately \$8.05 on video lottery play versus approximately \$243.52 for those adults identified as regular, continuous players.** If these revenue estimates were used to calculate average expenditures for VL players in the last month, the amount spent per VL player in Nova Scotia would be approximately \$130.97. While the projected estimate of annual net revenue for VLT's remains unchanged at approximately \$117,475,000, the results would suggest that approximately 11%, or approximately 75,000 adults in Nova Scotia, are contributing to this amount. In reality, 5.7%, or approximately 38,750 adults, are contributing approximately \$113,236,800, or approximately 96%, of the annual net revenue for video lottery gambling in the province. Therefore, it can be assumed that VL play behaviour differs significantly among those who are casual VL players and those who play on a regular, continuous basis (see Section 2.5 for Expenditures).

2.1.2 Lapsed Regular Video Lottery Play

Approximately 4.5% of Nova Scotians ($\approx 31,000$ adults) may be categorized as **Lapsed Regular VL Players**, or adults who used to play regularly (i.e., once per month or more) at some time in the past, but currently play once every few months or less often. (*NOTE: The sample size for Lapsed Regular Players (n=18) is too small to yield reliable estimates for within segment analysis. Therefore, the following analysis is descriptive in nature and provides insight as to the factors contributing to Lapsed Regular Play.*)

Those respondents identified as Lapsed Regular Players were asked how long ago they stopped playing the games on a regular monthly basis. Most (3.5% of adults) had given up regular play more than a year ago; one respondent stopped within the last year and three stopped playing regularly within the last three months.

The primary reasons why these adults stopped playing VL games regularly were related to the accessibility of the machines, cited by half of Lapsed Players. One-third of these respondents (6 out of 18) gave up regular play when the terminals were removed from corner stores (“*Because they moved them out of the corner stores and into bars, which I don’t tend to frequent*”; “*After they were taken out of the stores, I was not tempted to put a loonie in*”), and another three respondents mentioned a lack of convenient access (“*After my game at the golf course I play -- now that the golf season is over, I rarely play*”; “*I have a new job in a different location so it’s not convenient anymore*”).

Five of the 18 Lapsed Players gave up regular VL play because they were spending too much money and/or feared addiction (“*I was a compulsive gambler*”; “*I realized I was becoming addicted*”; “*I was losing too much money and never winning*”). Four Lapsed Players simply lost interest in playing, either becoming bored or tired of losing money (“*No interest in them -- I just tried them out if they were there*”; “*I just really never took to them, I just played for fun*”; “*I didn’t find the odds were that great*”). Only one respondent indicated a temporary cessation of regular play, in order to “*save money for Christmas*”.

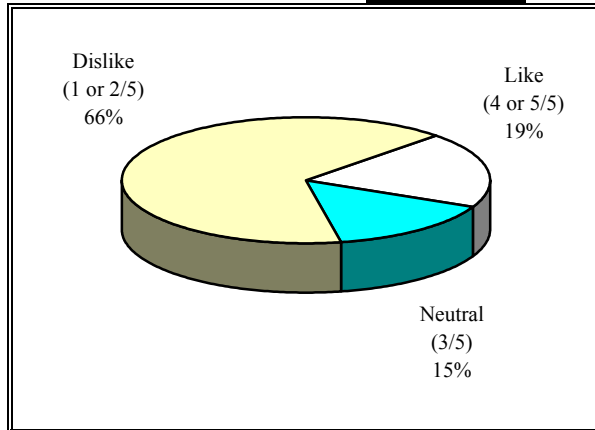
In terms of the Regular VL Player base (5.7% of adults), it appears that 1.4% of adults stopped playing over the last year (primarily due to concerns about addiction or spending too much money). However, this was offset by an additional 1.3% of adults who started playing on a regular basis during the last twelve months. Therefore, it can be estimated that there is a relatively high amount of churn (turnover in the percentage of adults playing regularly) within the Regular VL Player base in Nova Scotia, with approximately 25% of Regular Players ceasing play and a similar proportion taking up regular playing patterns. However, on average, current Regular VL Players have been playing the games on a regular basis for 3.6 years, suggesting that regular playing patterns for VL games are fairly entrenched for these adults.

2.1.3 Comparative Liking of VL Games

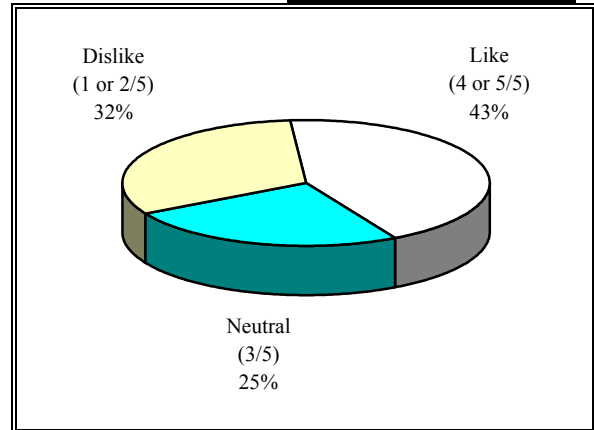
All adults who had ever tried video lottery gaming were asked to describe how much they like video lottery games using a one to five scale, where one means they like them much less and five

means they like them much more than other games of chance. The responses were examined and grouped into three liking segments to provide an overview of response.

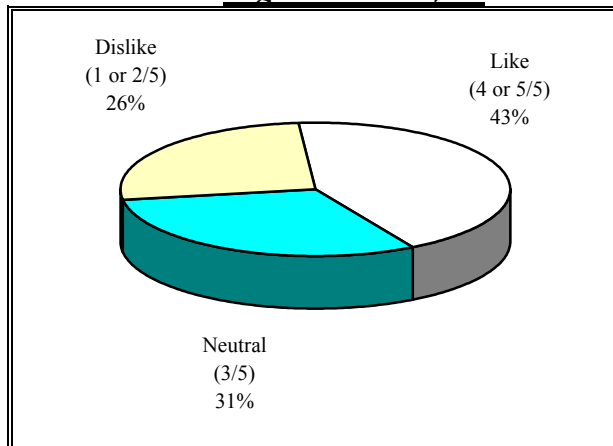
Comparative Liking of VL Games For Those Who Have Ever Played



Comparative Liking of VL Games For Those Who Played In Last Month



Comparative Liking of VL Games For Regular VL Players



Approximately two-thirds (66%) of all **trial VL players** report they like video lottery games less than other games of chance available for them to play. This represents approximately 25% of Nova Scotian adults, who have tried video lottery games but prefer other games of chance instead. Only 19% of those who have ever played VL games ($\approx 8\%$ of all adults) indicate they prefer this type of gaming over other options, with 15% of trial players ($\approx 6\%$ of adults) neutral in their preference.

When only those **adults who played in the last month** are considered, preference for VL games compared to other games of chance is considerably higher (43%). However, nearly one-third (32%) played video lottery games in the month prior to data collection but like these games less than other gambling activities. For **regular players**, liking of the games tends to be similar (43%) and, although fewer regular players responded negatively, **there are still 26% of regular monthly players who comparatively dislike video lottery gambling and yet continue to play on a regular basis.**

The results suggest that, for approximately one-quarter of all Regular VL Players (and for one-third of those who played in the last month), factors other than game appeal or liking are contributing to regular play levels. Presumably, Casual VL Players have simply played the games on impulse in the last month and are not involved in regular, continuous play. Therefore, given the lower relative appeal of the games to these Casual Players, it is unlikely they will adopt regular playing patterns. However, the fact that 25% of Regular

VL Players comparatively dislike the games, yet continue to play heavily, is of concern as this suggests their behaviour is motivated by habit (or compulsion) rather than enjoyment or preference for the activity. It should be kept in mind that, in some cases, VL play may be an accessible and convenient gambling outlet for those who do not have access to more preferred options (casino, horse racing). Regardless, the fact they continue to play a game they do not necessarily like is indicative of potential problems for a significant portion of players.

2.1.4 General Population Segmentation Analysis

To identify the characteristics and behaviours associated with video lottery play in the province, all adults were segmented into one of three groups for comparative profiling (in Sections 2.2 - 2.7):

Non-VL Players:

- 61.5% of adults in Nova Scotia;
- includes those who have never tried VL games and, thus, are not currently being targeted for play. This group is at low risk for VL play because they have not tried video lottery gambling and, for the most part, are unlikely to do so. However, there may be adults within this segment who would be vulnerable to VL play if they tried the games or if there were any changes in distribution strategies or management of VLT's in Nova Scotia. While these adults have no personal experience with play, in some cases, they will be exposed to VLT's indirectly through involvement by others. Non-VL Players comprise the majority of adults in Nova Scotia and, thus, will exert considerable influence on public opinion towards VL gambling. Furthermore, evidence suggests they also account for the majority of those seeking information or assistance to help others with VL problem gambling.

Casual VL Players:

- 32.8% of adults in Nova Scotia;
- includes those who have tried video lottery games at some time, but are not currently playing on a regular basis. While they comprise the majority of the target market for video lottery gaming ($\approx 85\%$), these adults do not currently have regular playing patterns and, thus, may differ significantly in terms of behaviours, attitudes and demographic characteristics for VL gambling in particular, and other gaming/gambling in general. Currently, Casual Players can be characterized as social players, although some have deliberately reduced play or stopped playing, either due to changes in lifestyles or in order to control their play of the games.

Regular VL Players:

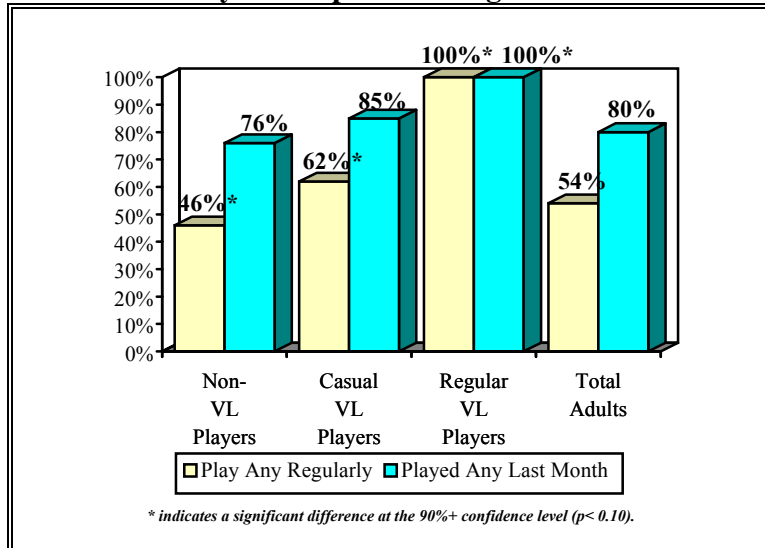
- 5.7% of adults in Nova Scotia;
- includes those adults who play video lottery games on a regular, continuous basis (once a month or more). Therefore, these adults are contributing the majority of revenue generated from VL gaming in Nova Scotia ($\approx 96\%$) and, consequently, are at greater risk for developing problems with VL gambling.

NOTE: *In Section 3.0, the regular player base is segmented into the three primary player segments: 1) Infrequent Players; 2) Frequent Non-Problem Players; 3) Problem Players. These player groups are profiled and compared for response on various dimensions of video lottery play, attitudinal and behavioural measures.*

2.2 Gambling Activities And Behaviours

2.2.1 Participation in Gambling Activities

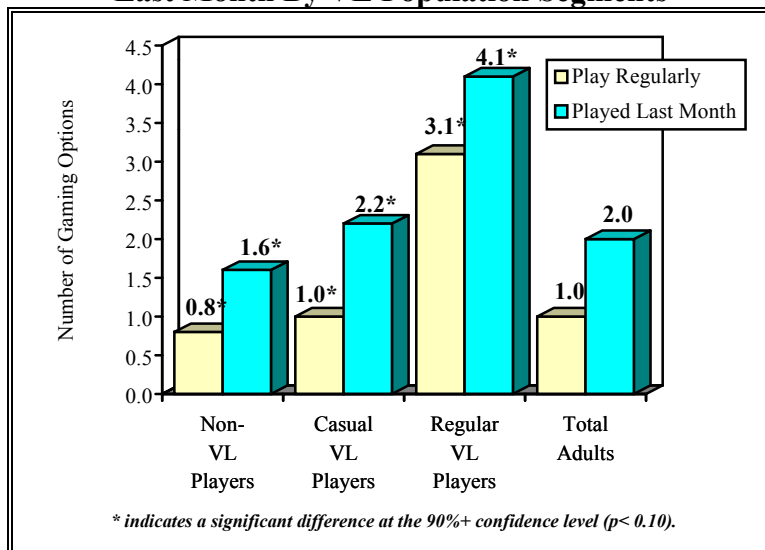
**Participation In Any Gambling Activities
By VL Population Segments**



For the most part, playing games for money in Nova Scotia is a widespread and socially accepted entertainment option. Almost every adult in the province (94%) has played at least one type of game offering money prizes before, and the strong majority (80%) participated in at least one gambling activity in the last month. Just over half (54%, or $\approx 367,000$ adults) gamble on a regular monthly basis.

The percentage of Non-VL Players who participate in gambling activities regularly (46%) and in the last month (76%) are only slightly below the population figures, while Casual VL Players are more likely to play a game for money regularly (62%) and to have played in the last month (85%). Regular VL Players, by definition, play at least one gambling activity regularly and have played in the previous month.

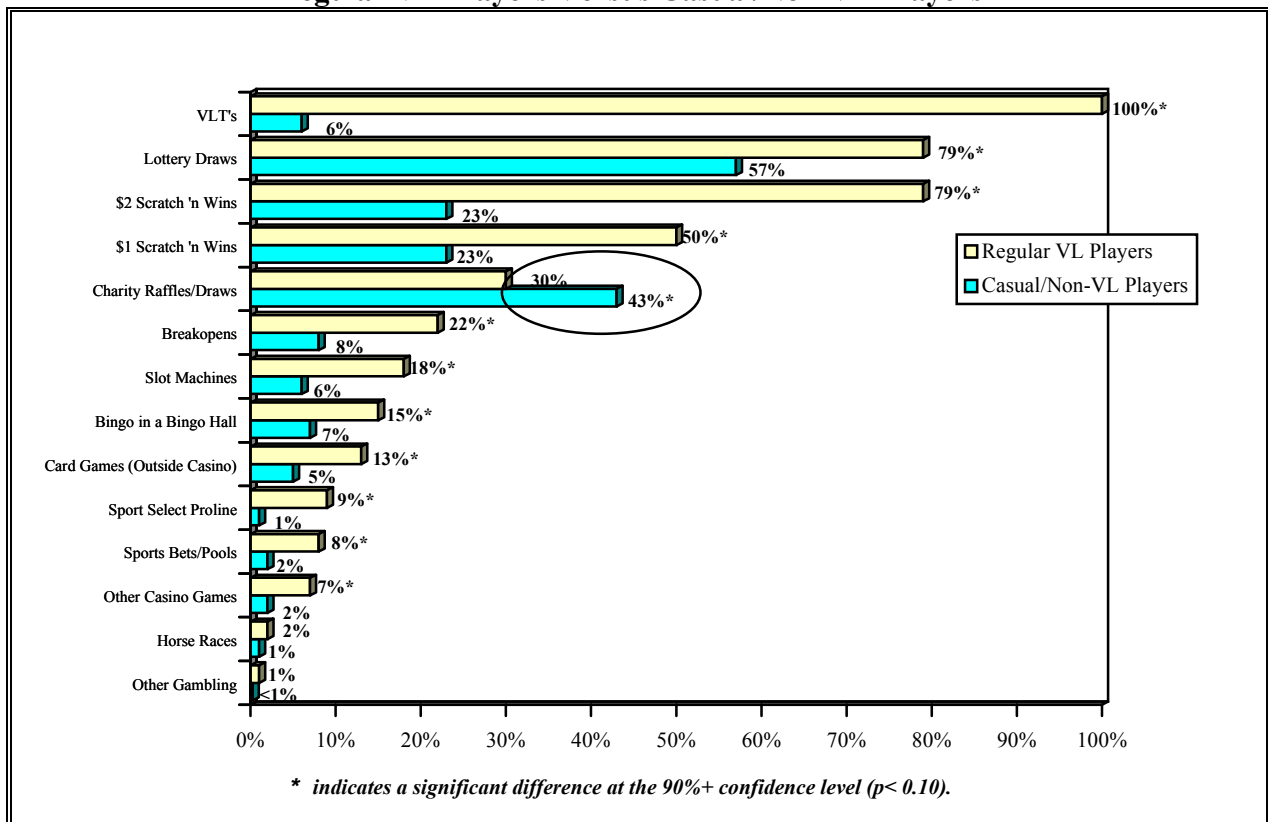
**Number of Gaming Options Played Regularly & In The
Last Month By VL Population Segments**



Regular VL Players tend to play a greater variety of gaming options regularly, with an average of 3.1 games played on a regular monthly basis. In fact, the number of gambling activities played increases in relation to involvement with VL gaming. Non-VL Players participate in the fewest gaming options on average, both regularly (0.8) and in the month prior to data collection (1.6), while Casual VL Players play significantly more games of chance for money (1.0 regularly, 2.2 in the last month).

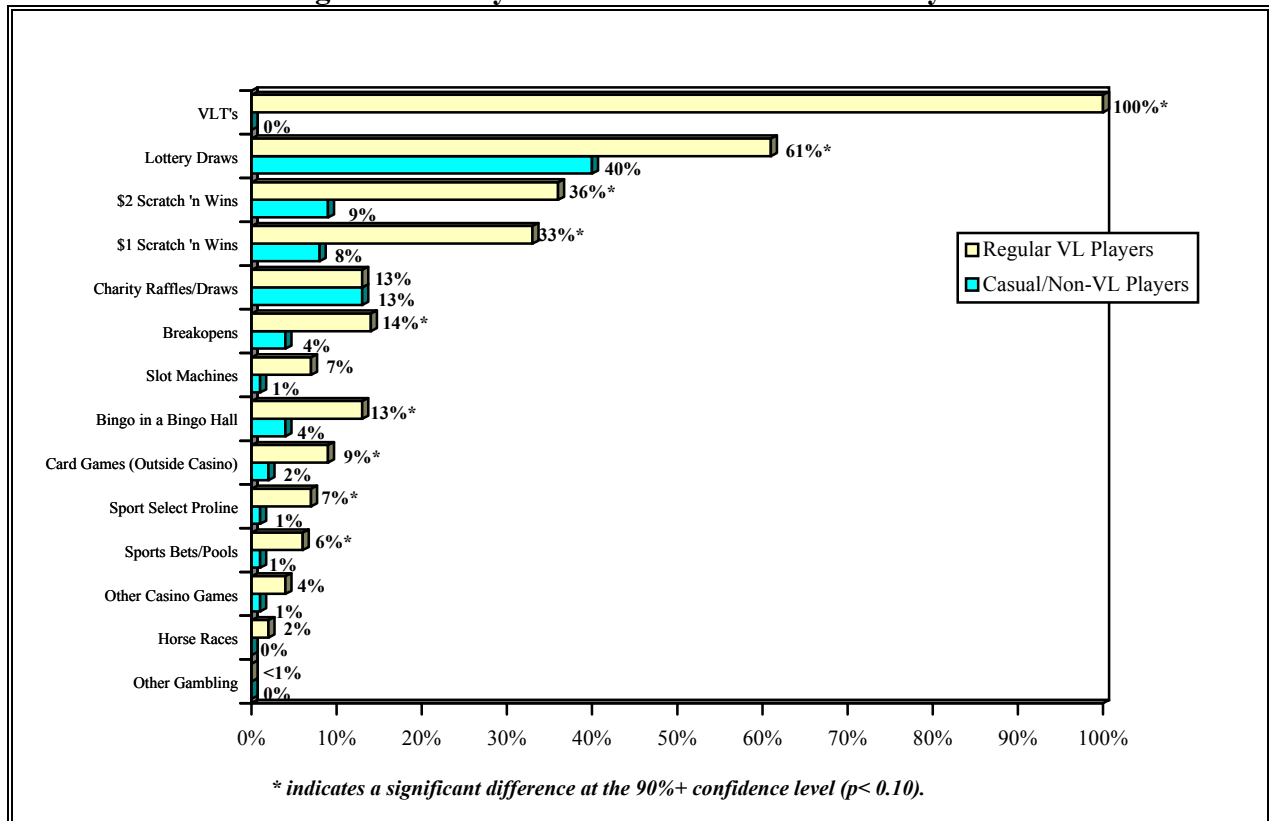
Participation in gambling activities during the month prior to data collection was similar for Casual and Non-VL Players. The only differences were primarily lottery ticket games (Casual VL Players were more inclined to have purchased lottery draws, \$2.00 and \$1.00 Scratch 'n Wins, and 50¢ Breakopens) and slot machines at a casino. Also, Casual VL Players tended to play more games of chance, on average, in the last month (2.2 versus 1.6). For regular monthly play, the differences between these two segments are even fewer (\$2.00 and \$1.00 Scratch 'n Wins, and Breakopens only). Therefore, Casual and Non-VL Players were combined for comparison to the gambling behaviours of Regular VL Players.

**Play of Gambling Activities In The Last Month
Regular VL Players Versus Casual/Non-VL Players**



Overall, Regular VL Players are significantly more likely to have participated in each gambling activity during the last month, with the majority having purchased lottery draw tickets (79%), \$2.00 Scratch 'n Win tickets (79%) and \$1.00 Scratch 'n Win tickets (50%). The only notable exception is charity raffles and draws, with Casual/Non-VL Players (43%) more inclined to have purchased this type of ticket than Regular VL Players (30%).

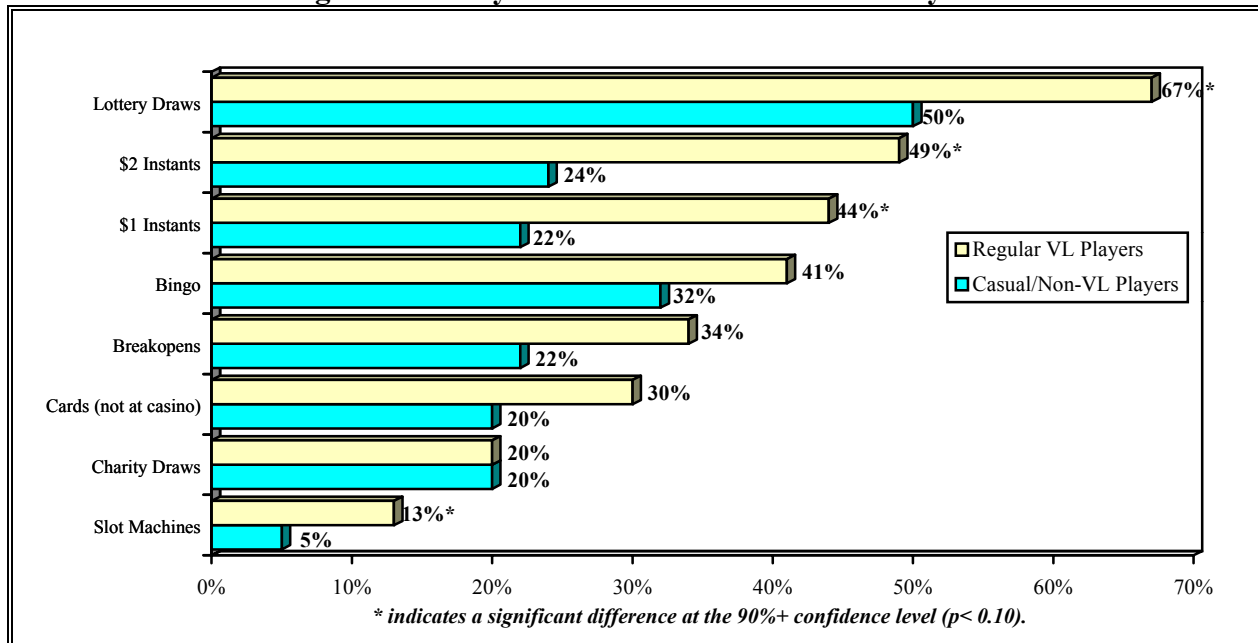
Regular Play of Gambling Activities Regular VL Players Versus Casual/Non-VL Players



The discrepancy in participation in gambling activities between Regular VL Players and other adults also holds true when regular monthly play is considered. Essentially, **significantly more Regular VL Players play each type of game for money at least once per month on a regular basis, as compared to Casual/Non-VL Players.** While these Non-Regular VL Players were more inclined to buy charity draw tickets during the month prior to data collection, Regular VL Players are just as likely to report purchasing this type of game on a regular basis (13%).

These results suggest that Regular VL Players are “consummate gamblers”. This group of adults appears to be attracted to games of chance played for money to a much larger degree than other adults. More than half (61%) of Regular VL Players are monthly lottery draw ticket players and approximately one-third (33% to 36%) buy Atlantic Lottery’s Instant Scratch ‘n Win ticket games, compared to less than 10% of those adults who do not play video lottery games on a regular basis. Regular VL Players are at least three times as likely as other adults to also be regular players of 50¢ Breakopens (14% versus 4%), bingo in a bingo hall (13% versus 4%), card games for money outside a casino (9% versus 2%), slot machines at a casino (7% versus 1%), Sport Select Proline (7% versus 1%) and other sport bets or pools (6% versus 1%).

Continued Adoption For Gambling Activities Regular VL Players Versus Casual/Non-VL Players

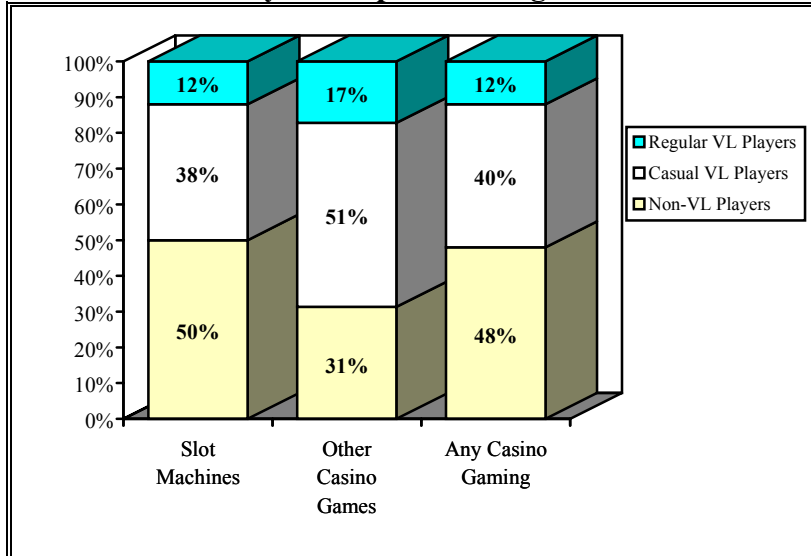


Not only are they more inclined, in general, to play most games of chance for money regularly, Regular VL Players are also more likely than Casual/Non-VL Players to adopt regular play habits of these gambling activities after they try them. Two-thirds (67%) of all Regular VL Players who have ever purchased lottery draw tickets are now playing on a regular monthly basis, compared to half (50%) of those Non-Regular VL Players who have tried lottery draws. Continued adoption by Regular VL Players is also twice as high for both \$2.00 (49% versus 24%) and \$1.00 Scratch 'n Wins (44% versus 22%), and higher for 50¢ Breakopens and slot machines at a casino.

Interestingly, adoption levels do not differ significantly between the two segments for charity raffles and draws, bingo in bingo halls and card games for money. Of all the categories of gambling options available, these may be described as more social gambling activities which often involve interactions with other people during play. For the Casual and Non-VL Players, the adoption rates for most games of chance are similar ($\approx 20\%$ to 24% for each option other than lottery draws and slot machines). **While Regular VL Players are just as likely as other adults to adopt the more social gambling activities, they are significantly more inclined to be attracted to the more solitary games that appear to offer higher returns for the investment and are typically played alone (e.g., Scratch tickets, lottery draws, slot machines, and VLT's).**

2.2.2 Casino Gambling

**Penetration For Trial of Casino Gambling
By VL Population Segment**



With the assumption that there is a relationship between play of video lottery games and play of casino gaming (slot machines, in particular), a separate analysis was conducted for casino gambling among the three VL Population segments.

While Regular VL Players account for 5.7% of all adults in Nova Scotia, they represent 12% of all adults who have ever played any type of game at a casino, and 12% of those who have

specifically tried slot machines. Penetration is even higher for other casino games (e.g., card games, roulette) at 17%, suggesting that a relationship does exist.

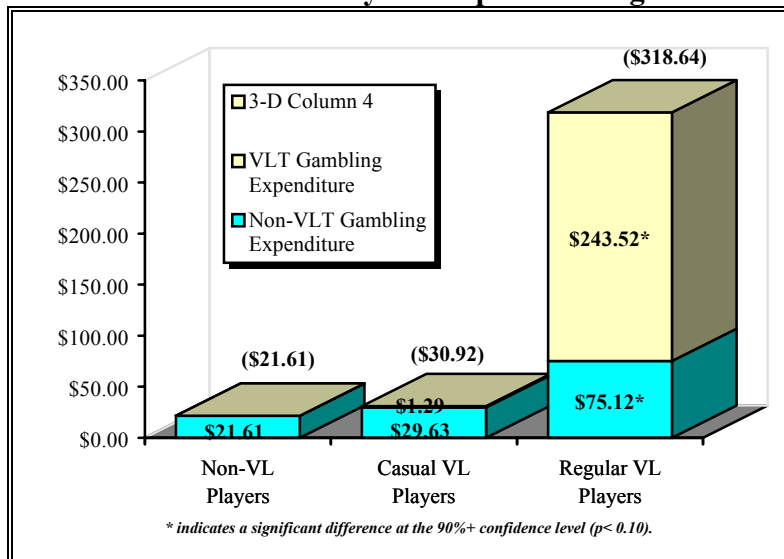
It is noteworthy, however, that 22% of Non-VL Players have also tried casino gambling at some time in the past. All of these adults have tried slot machines, with only 4% of Non-VL Players (≈18% of these slot machine trial players) having ever played any of the other games found at casinos. In fact, Nova Scotians who have never played a VLT comprise half of all adults who have tried the slot games. When continued adoption rates are calculated for casino gaming, there are **no significant differences between Non-VL Players and Regular VL Players in terms of adoption of regular play for slot machines (8% and 12%) or of any casino gambling (9% and 14%) after trial.**

This is likely attributable to accessibility. For Regular VL Players, slot machines rank fifth out of the 14 gaming categories in terms of trial, yet regular play ranks 10th. Given that the slot machines are only available at two locations in Nova Scotia (Halifax and Sydney Sheraton Casinos), play is relatively inaccessible and inconvenient, as compared to VL machines. This underscores the impact of accessibility to the machines and suggests that further restriction of VLT distribution would effectively reduce play levels of the games (when asked, approximately 38% of Regular VL Players strongly agreed with the statement, “I would prefer VL machines were only available in 3 or 4 restricted places within Nova Scotia” (rating of 5 out of 5)).

2.2.3 Gambling Expenditures

On average, Regular VL Players spent a significantly higher amount in the month prior to data collection on each gambling activity compared to both Casual and Non-VL Players. The only exceptions are charity raffles and draws, for which there was no difference in expenditure among the three segments (\$3.76 to \$4.86) and card games for money outside of casinos, with no significant difference in expenditures for Regular VL Players (\$5.08) and Casual VL Players (\$2.18).

Average Amount Spent On Gambling Activities In The Previous Month By VL Population Segments



In terms of total monthly expenditure on gambling activities, the much higher amount spent by Regular VL Players comes primarily from expenditure on video lottery games (\$243.52 versus \$1.29 for Casual VL Players), although they tend to spend much more on other types of gambling as well. **Regular VL Players spent, on average, \$75.12 in the last month on non-VLT gambling, more than 2.5 times what Casual VL Players spent (\$29.63) and nearly 3.5 times what Non-**

VL Players spent (\$21.61). This reinforces the observation that Regular VL Players are attracted to virtually all forms of gambling and suggests that if their access to VL machines were restricted, they may switch some of their existing video lottery game expenditure to these other forms of gambling.

Non-VL Players spend the largest amount of their gaming expenditure (\$5.80) on Atlantic Lottery Corporation draw games, followed closely by charity raffles/draws (\$4.54) and slot machines at casinos (\$4.11), with bingo at bingo halls a distant fourth (\$2.58). Interestingly, while this monthly expenditure level on slot machines is about the same as charity draws and lottery draws, play in the last month is substantially lower within this segment (4% played slot machines versus 43% buying charity tickets and 54% buying lottery draw tickets). Given that most slot machines cost \$0.25, \$1.00 or \$2.00 per spin (also similar to charity and lottery draw tickets), this suggests that those Non-VL Players who do play slot machines spend a significant amount of money over the course of a month (the sample size for slot machine players within this segment are too small to profile). Regardless, these four types of games account for approximately 79% of Non-VL Players' total gambling expenditure.

Casual VL Players have a spending pattern similar to Non-VL Players, although the same four gaming categories account for only 65% of their total gambling expenditures. Casual VL Players tend to spend more money on lottery draws (\$8.76 versus \$5.80), and spend more money on \$2.00 Scratch 'n Wins (\$2.88 versus \$1.14) and card games for money (\$2.18 versus \$0.70) as compared to Non-VL Players (these six types of games account for 85% of their total expenditures). The larger expenditures by Casual VL Players on these other games reflect their interest in a diversity of games for money (2.2 gaming options played in the last month versus 1.6 for Non-VL Players). **These Casual VL Players therefore try a variety of games (including VLT's) without spending excessive amounts on any one of them.**

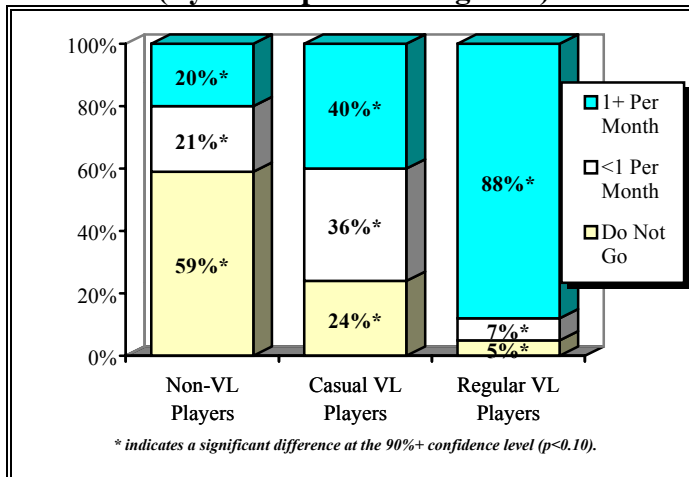
Regular VL Players play more game options (4.1 in the last month) and far out-spend the other segments on most games. As a whole segment, Regular VL Players are interested in all forms of gambling and reserve approximately 24% of their gaming funds to spend on these other games. It is not known how much they spent on other games before playing video lottery games, nor is it known how much they would spend on these games were VLT access restricted. It is possible that many Regular VL Players switched expenditure to VLT's from these other forms of gambling once the machines became available, or as they developed regular playing patterns for the video lottery. It may be that a good portion of their gaming budget would be switched back to them, if their VL gambling was curtailed. (This issue is examined in greater detail in Section 2.5 - Entertainment, Gambling & VLT Expenditures.)

2.3 Accessibility To VLT Machines

Currently, VLT machines are restricted to licensed establishments in Nova Scotia. Therefore, it can be assumed that frequency of going to a bar/club or lounge will be associated with video lottery play. What is not clear, however, is the direction of the relationship; once a potential player tries the machines is he/she then more inclined to go to bars or to play or does being in a bar frequently lead to higher, more frequent play levels? In order to determine the interaction between accessibility and play, all study respondents were asked for their frequency of going to a licensed establishment. Furthermore, to estimate the impact of planned versus impulse play, all respondents indicated the number of times they were in a location with VLT's during the last month. Regular VL Players also reported, of all the times they were exposed to VL gaming, how many times they were in the location specifically to play VLT's and how many times they ended up playing the machines even though they were there for another reason. This allowed estimates to be derived which differentiate between deliberate, planned play and impulsive, opportunistic play.

2.3.1 Frequency Of Going To A Licensed Establishment

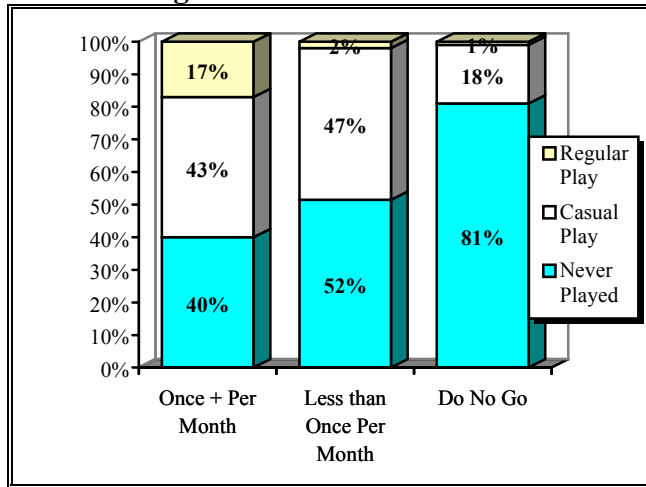
**Frequency of Going to a Licensed Establishment
(By VL Population Segment)**



As would be expected, Regular VL Players are more than twice as likely as even Casual VL Players to be in a bar location each month (88% versus 40%). Conversely, only 20% of Non-VL Players (those who have never tried VLT's) are in licensed establishments each month, with the majority (59%) indicating they do not go to bars even on a casual, periodic basis. Thus, simply by virtue of where the machines are located, Non-VL Players are less inclined to be exposed and, therefore, to try the games.

It may be somewhat surprising to note that 12% of Regular VL Players are not typically in bars/pubs/lounges on a monthly basis. This suggests that, despite the heavy skew of the machines towards these types of bar locations, there is still a sizable proportion of Regular Players who are continuing to play the machines elsewhere. In most cases, this includes restaurants or native gambling establishments. However, for others, it suggests regular play at private (illegal) locations ($\approx 3\%$ of Regular VL Players).

Penetration of VL Play By Frequency of Going to a Licensed Establishment

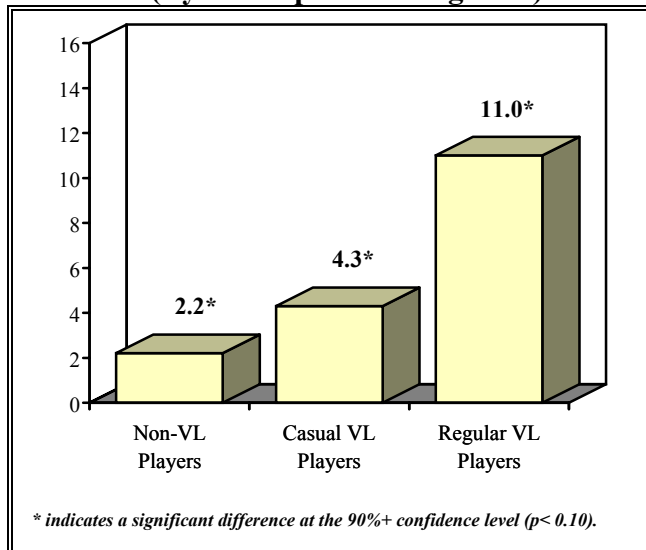


It should be kept in mind that, despite the greater tendency for Regular VL Players to be in bars, Casual and Non-VL Players still comprise the bulk of those adults who are in bar locations each month (83% versus 17%). However, Regular VL Players go to bars approximately four times more often than other monthly bar patrons so they will make up a larger proportion of adults who are in the bars each day. In fact, one-third (33%) of all those adults who are in a bar more than once a week are Regular VL Players. **This means that, while Regular VL Players account for only 17% of all adults who go to a bar location each month, on any given day, they will**

comprise up to 33% of all those in a bar/pub/club or lounge in Nova Scotia.

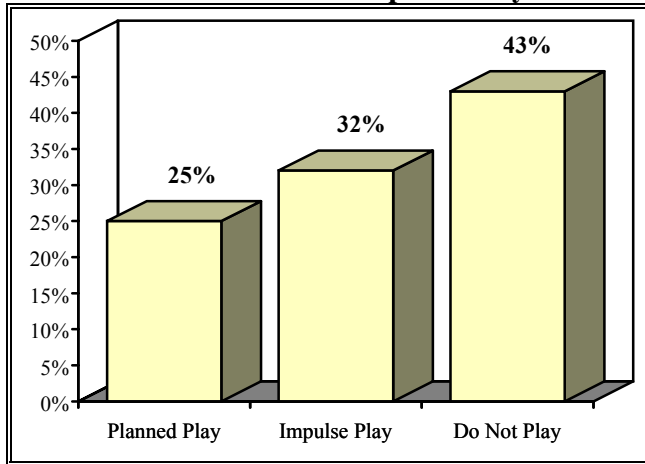
2.3.2 Planned Versus Impulse Play

Average Number of Times in a Location with VLT's Each Month (By VL Population Segment)



When all locations which have video lottery machines are taken into consideration, Regular VL Players are typically in these locations approximately eleven times each month versus only 4.3 for Casual VL Players and 2.2 for Non-VL Players.

Percentage of Times Regular VL Players are in a VLT Location to Specifically Play VLT's Versus Impulse Play

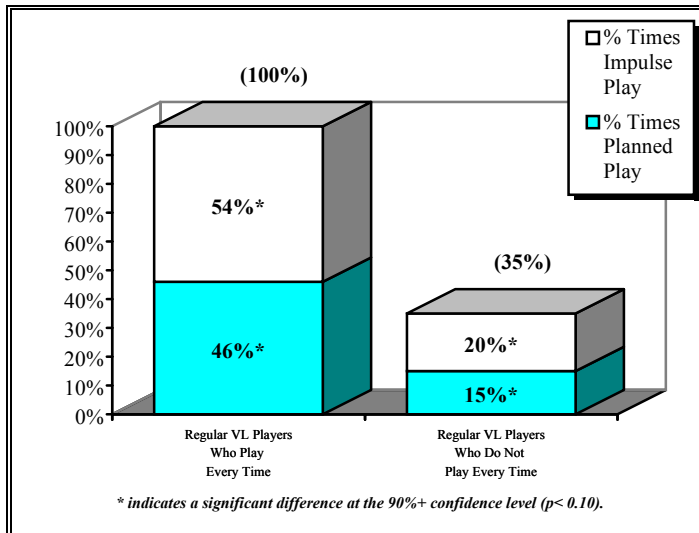


Of all the times Regular VL Players are in locations which have VLT's, on average, each month they will play the machines just over half of the time (57%). Overall, only 25% of the times they are in VLT locations is to specifically play the games. Regular VL Players are generally more inclined to be playing the games on impulse; they have gone to a VLT location for other reasons (e.g., to socialize, play darts, etc.) and in 32% of the cases, will end up playing video lottery as well. **Therefore, the play frequency of video lottery games for Regular VL Players is strongly influenced by the greater inclination for these adults to be**

in locations which have the machines for reasons other than to play the games. On average, over half of the times (56%) they play video lottery is on impulse "because the machines are there" and available for play.

☞ **"Every Time" Players**

Percentage Planned Versus Impulse Play By Regular VL Players Who Play Every Time They Are in a VLT Location Versus Those Who Do Not



It is noteworthy that 34% of Regular VL Players tend to play VL games every time they are in a location which has the machines. On average, these players are in VLT locations less often than other Regular Players (7.7 times/month versus 12.6 times/month), yet almost half of the time they are there is to specifically play the games (46%) versus only 15% for other Regular Players. Impulse play is also higher for these "every time" Regular Players (54% versus 20%). **Therefore, the majority (66%) of Regular VL Players only play VL games approximately 35% of the times they are typically exposed to play. For the remaining one-third**

of Regular VL Players (the "every time" players), approximately half of the time they are exposed to VL games each month is to deliberately play the games and in the other half of the cases, they end up playing anyway.

This group of Regular Players represents approximately 2% of all adults in Nova Scotia.

There are significant demographic differences in the profile of Regular Players who play every time they are exposed to the machines versus those Regular Players who do not.

The incidence of “*every time*” players tends to be higher for Regular Players in the following segments:

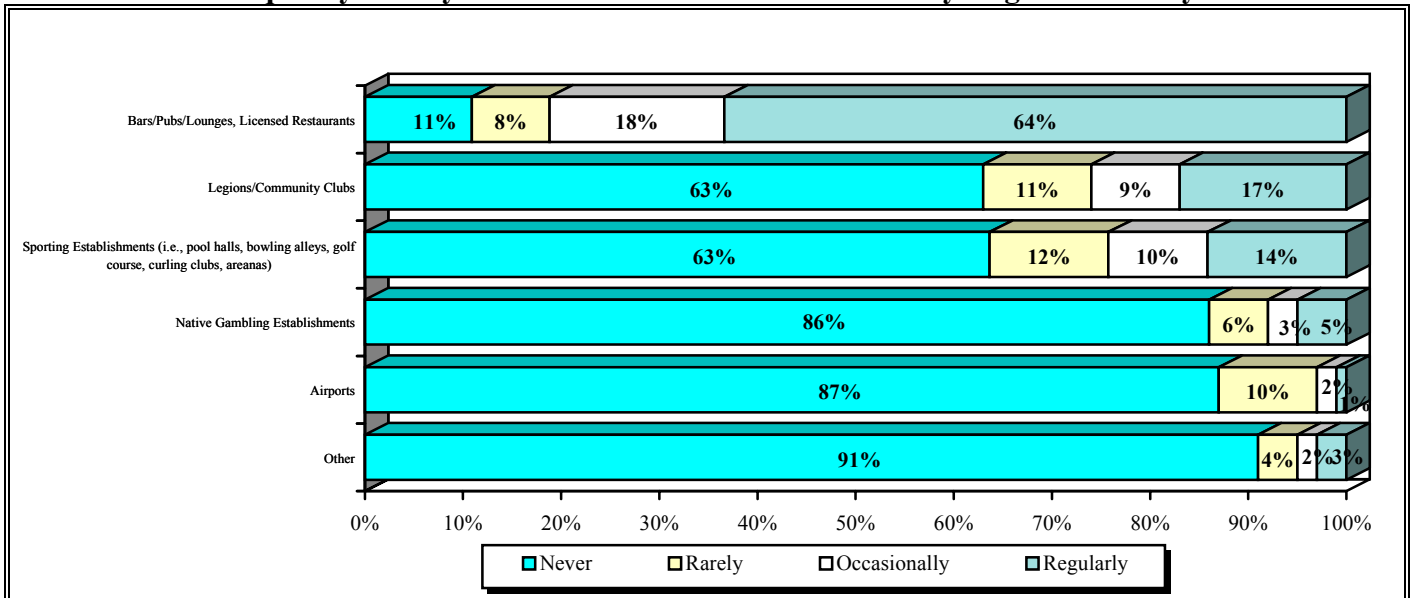
- Regular VL Players who are 55 years of age or older (59%). Players aged 19 - 24 are least likely to be playing every time they are in a location with the machines, especially compared to those over 40 years (26% versus 41%). This means that, although the youngest VL players in Nova Scotia are in bars more often (12.7 versus 10.4), they actually end up playing slightly less often, on average, than older players (≈ 4.8 versus 5.1 times per month);
- those Regular Players with lower educations, especially with vocational/trade school educations (38%), as compared to those with university level educations ($\approx 27\%$);
- those living in single person households (50%);
- those who are separated/divorced or widowed (50%);
- those with lower household incomes (under \$25,000: 42%), as compared to those living in mid-income households (\$25,000 - \$45,000: 30%) and, to a lesser extent, high income households (\$45,000+: 35%).

It appears that Regular Players in these demographic segments are at greater risk for having problems in managing their play and, thus, may benefit from assistance in controlling play when they are exposed to the games at VLT locations.

2.3.3 Types of Locations At Which Regular VL Players Play

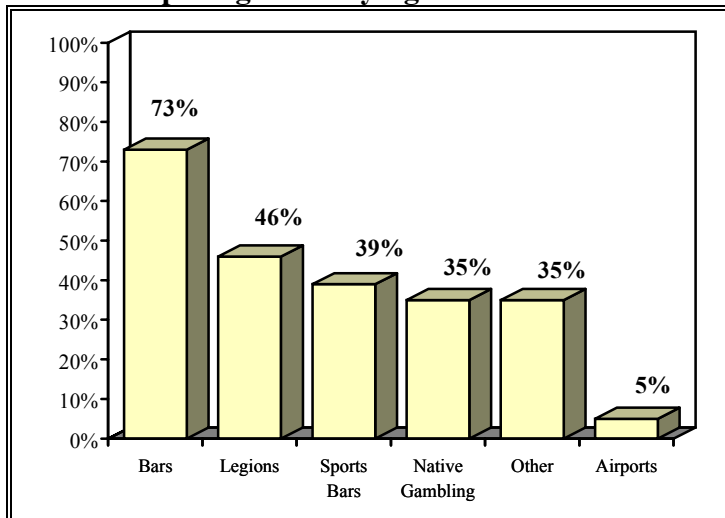
All Regular VL Players were asked to indicate how often they play at particular VLT locations throughout Nova Scotia. To avoid any “threatening” questions which may lead respondents to be less honest in their responses, an “*other location*” category was included in addition to the standard location categories. This allowed respondents to include play at illegal or private locations without having to reveal a specific source. All location categories were created and described to respondents as mutually exclusive to avoid overlap among the categories.

Frequency of Play at VLT Locations in Nova Scotia By Regular VL Players



As noted, the majority of Regular VL Players play the machines at least once a month at general licensed establishments such as bars/clubs/pubs/lounges (64%). Only 19% either rarely (8%) or never (11%) frequent these locations. For these 19% of Regular VL Players who do not typically play at bars, the most popular regular VLT locations are legions (45% play regularly), and sports bars (23%), although 10% play at Native gambling establishments and 8% frequent “other” gaming venues (excluding standard licensed establishments in Nova Scotia).

Percentage of Regular VL Players Who Have Played At A Particular Location Who Adopt Regular Playing At The Location

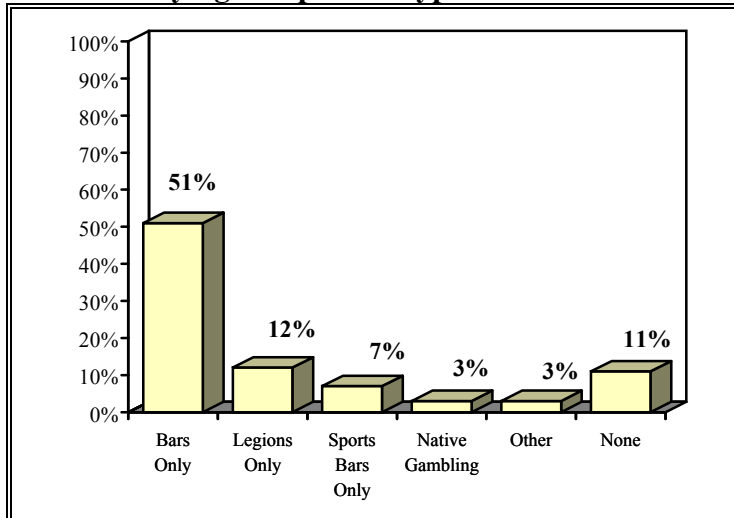


Not surprisingly, **airports** are least likely to be adopted as a regular play location and, conversely, 73% of Regular VL Players who play at **bars** do so on a regular monthly basis.

Legions (46%) and **sports locations** (39%) have similar levels of adoption for regular play. Since these venues are often associated with other social and leisure activities, it appears that VL play is incidental to these other recreational/social pursuits. Thus, the majority (54%+) of all those VL players who play at these types of locations do so on a casual rather than regular basis,

most likely reflecting the fact that typically they are not in these locations as often, and when they are it may be for other reasons.

Percentage of Regular VL Players Exclusively Playing At Specific Types of Locations



Overall, 11% of Regular VL Players do not have a particular type of location at which they play on a regular basis. Not surprisingly, these players, on average, are in VLT locations less often each month (9.9 times versus 11.2), and play less often each month (3.3 times versus 4.9) than those who have a regular play location. **There is also evidence that those who do not have a preferred type of location are less likely to manifest problem play behaviour** (10.4% versus 17.2% for those with regular locations).

However, regular play at locations other than bars/clubs/pubs and lounges may be associated with higher levels of problem play than is the case noted for the traditional VLT bar locations (see Section 3.0 Problem VL Gambler for detailed analysis).

2.4 Social & Leisure Activities Profile

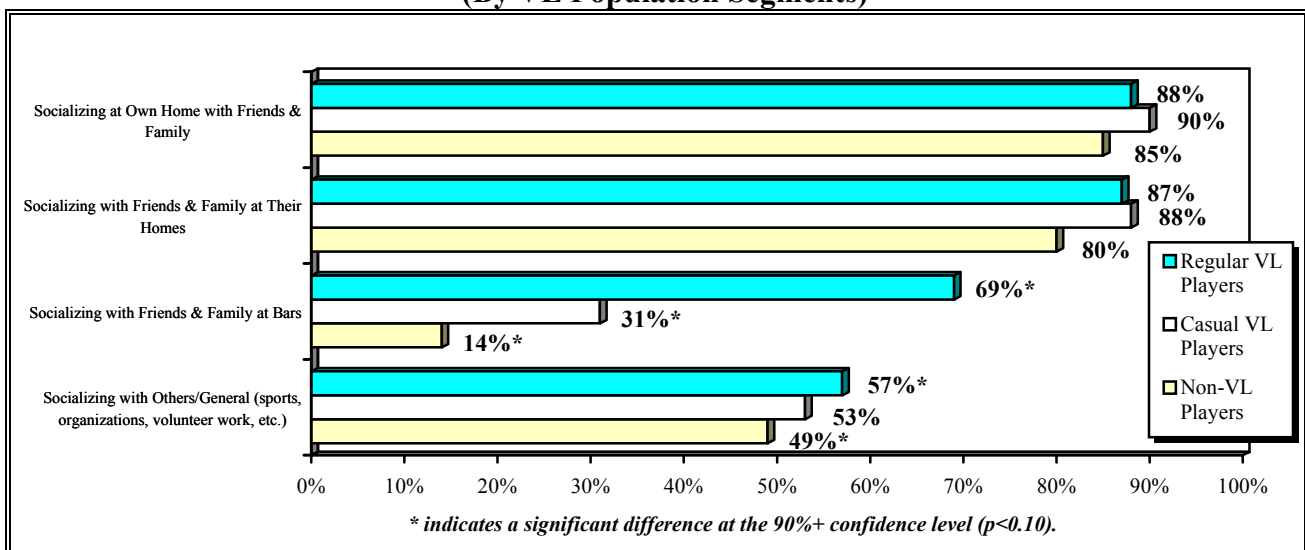
To understand lifestyle factors which may be associated with, or contributing to, video lottery play, all adults participating in the study were asked to indicate the amount of time they typically allocate to various activities in an average week. This information provides a snapshot of general lifestyles for comparison among the three population segments. However, some social and leisure activities are not undertaken on a weekly basis, yet may differentiate behaviour among adults. Therefore, for specific activities such as visiting friends or family, going to church, visiting historical sites or cultural events, etc., all respondents indicated how often they participate in these activities each month. Given the location of video lottery machines in licensed establishments, drinking and smoking habits for Regular Players were also examined.

Undoubtedly, lifestyles and involvement in various social and leisure activities are strongly influenced by demographic characteristics. For example, younger adults are more likely to be socializing in bar locations. Therefore, many of the differences observed among the three population segments can be explained by the demographic profiles for each segment. Section 2.6: Demographic Profile of VL Play, builds upon the findings in previous sections of the report. However, an overview of lifestyle characteristics and involvement in social and leisure activities provides greater insight in evaluating the contribution of other, non-demographic characteristics for Regular Video Lottery Players.

2.4.1 Weekly Social & Recreational Activities

Contrary to many previously held perceptions, it appears that Regular Video Lottery Players are more socially active than other adults in Nova Scotia and are more inclined to be involved with others in most social and leisure activities.

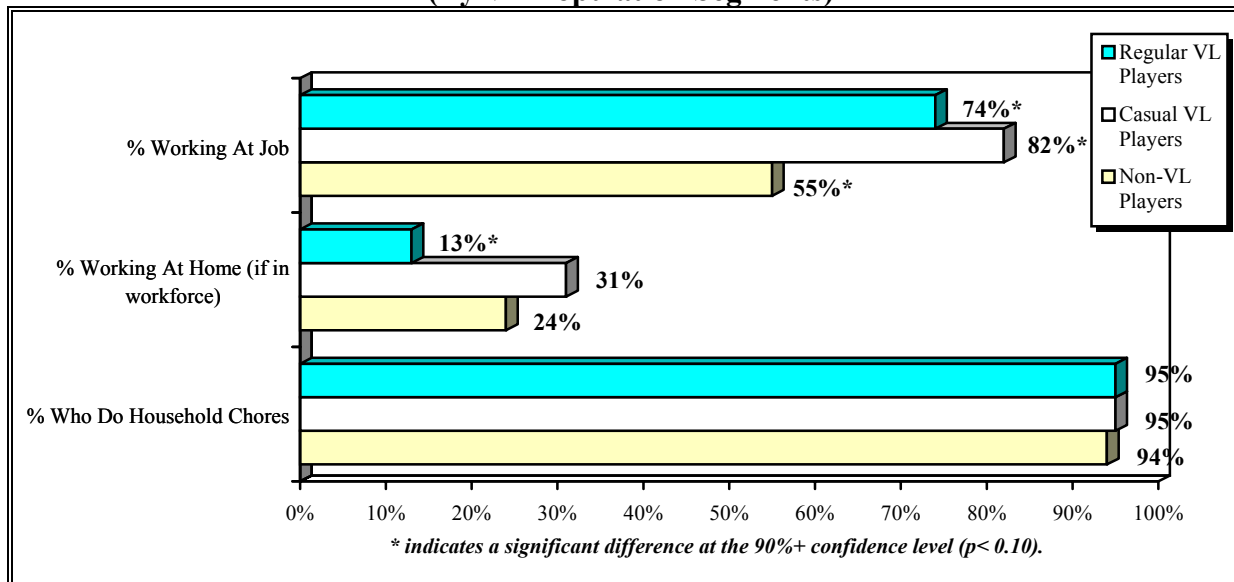
**Percentage Socializing With Friends, Family & Others Each Week
(By VL Population Segments)**



On average, each week, Regular VL Players (88%) are just as likely as Casual (90%) and Non-VL Players (85%) **to socialize with friends and family in their own home**, with all adults spending approximately two hours per week entertaining at home. Both Casual (88%) and Regular VL Players (87%) are more inclined than Non-VL Players (80%) to be going to **someone else's home to socialize**, with Regular VL Players spending, on average, one hour more per week visiting friends or families than those who play VLT's on a casual basis (~4 hours versus 3 hours). One of the key distinctions for Regular VL Players is the greater tendency for them to **socialize with friends and family at bar locations or licensed establishments** (69%). Not surprisingly, Non-VL Players are least likely to go to bars for this reason each week (14%). However, **even Casual Players (who, on average, tend to be as young as Regular Players) are less than half as likely to socialize with friends/family in a licensed establishment, as compared to Regular VL Players (31% versus 69%). Regular Players, typically, spend two hours per week socializing with friends or family in a bar, club or lounge. Thus, it is not surprising that 89% of them play VLT's weekly, usually spending one hour each week playing.**

Regular VL Players are also significantly more inclined than Non-VL Players to be involved with others by playing sports or participating in other voluntary organizations or groups (57% versus 49%). Although this level of involvement is similar to that noted for Casual Players (53%), Regular VL Players, on average, devote twice as much time to these activities each week (2 hours versus 1 hour). It should be noted that the majority of this involvement by Regular VL Players is likely in response to sports, as Regular VL Players are significantly less likely than Non-VL Players to be participating in volunteer work (20% versus 35%) or community clubs (21% versus 31%).

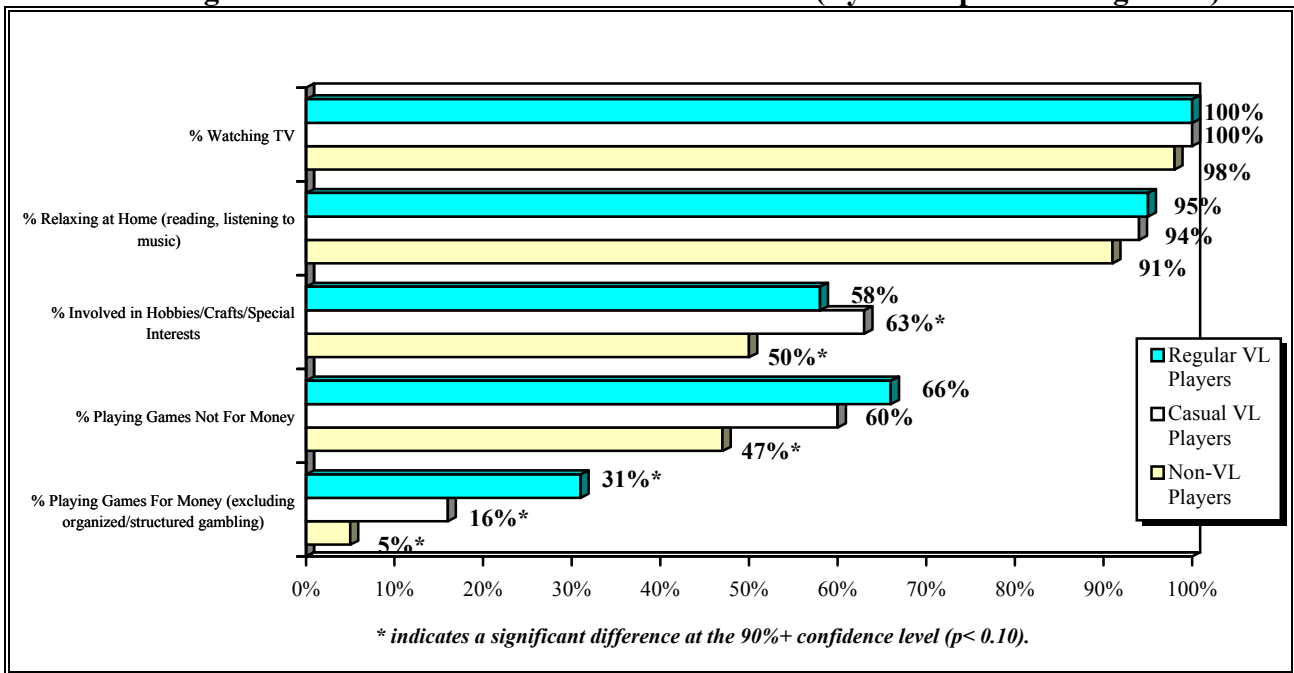
**Percentage Working at a Job Outside & Inside the Home
(By VL Population Segments)**



In terms of work, although Regular VL Players are slightly less inclined to be employed than Casual Players (74% versus 82%), on average, those who work in each group spend approximately forty hours per week employed outside the home. However, Casual Players (31%), and to a lesser extent Non-VL Players (24%), are significantly more likely to bring their work home with them, as compared to only 13% of Regular VL Players who typically are working at home at some time each week. The greater tendency for Casual VL Players to be employed in white collar, professional occupations is most likely influencing this difference between the two player groups.

Non-VL Players, in general, are older, are more likely to be female than adults in the other two segments (see Section 2.6) and have a higher proportion of those who are income supported (i.e., retired, homemakers). Thus, fewer Non-VL Players are working outside the home (55%). Although adults in all three segments are equally likely to contribute to household chores each week ($\approx 95\%$), Non-VL Players allocate almost twice as much time to maintaining their home than either Casual or Regular VL Players (≈ 12 hours/week versus ≈ 7 hours).

Percentage Involved in Leisure Activities Each Week (By VL Population Segments)



Weekly participation in leisure activities for Regular VL Players is similar to that noted for other adults. Almost everyone watches television each week, although Casual VL Players (≈ 14 hours) and especially Regular VL Players (≈ 15 hours) spend substantially more time in front of the TV than Non-VL Players (≈ 10 hours). Regular VL Players are also slightly more inclined than Non-VL Players (95% versus 91%) to spend time relaxing at home, playing music and/or reading, with adults in all three groups allocating approximately ten hours per week to “relaxing at home.” Despite the skew towards older adults and women, Non-VL Players are least likely to be involved in hobbies, crafts or other special interests (50% versus 58% - 63%). It may be, in some cases, that certain activities are considered more of a “chore” or regular part of their daily

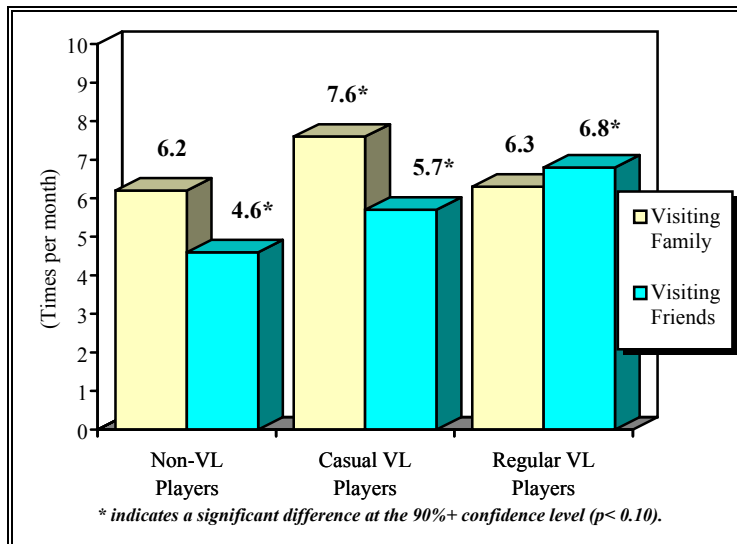
routine rather than a hobby or craft for this group (e.g., knitting, gardening). While Regular VL Players are just as likely as Casual Players to be involved in a hobby or special interest, they tend to spend half as much time on these activities each week (2 hours versus 4 hours).

Overall, approximately half of all Nova Scotian adults play games each week strictly for fun or entertainment, as compared to 10% who play games for money (excluding organized/regulated gambling). Almost two-thirds of Casual (60%) and Regular VL Players (66%) are involved in card, board or computer games each week that do not involve wagering or betting. However, twice as many Regular VL Players (31% versus 16%) also play these types of games for money as well. Not surprisingly, Non-VL Players are less likely to be involved in either pastime (47% and 5%, respectively).

These results suggest that adults who play VL games tend to be “busy people” in general. When compared to Non-VL Players, they are more likely to entertain at home, visit other people in their homes, socialize at bars/licensed establishments, participate in organized sports, work outside the home, relax at home, participate in hobbies/crafts and play games (both for money and for fun). While there is undoubtedly some overlap among these activities (e.g., a weekly poker game with friends may be considered both socializing with friends at their home and playing games for money), it would seem that VL Players have no shortage of weekly social activities. Conversely, it appears that Non-VL Players, in general, tend to spend more time during a given week doing fewer different activities (e.g., household chores, hobbies/crafts, relaxing at home) and, thus, arguably have a “slower paced” lifestyle centered more often on family and their community.

2.4.2 Participation In Activities In An Average Month

**Average Number of Times Per Month
Visiting Family & Friends**

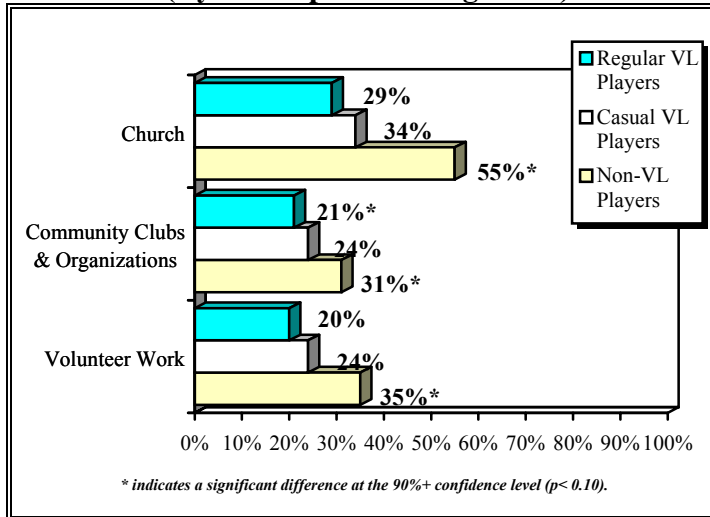


Casual VL Players are most inclined to be involved in family functions or events each month (93% versus $\approx 87\%$) and, therefore, on average, go to visit family 7.6 times per month versus only approximately 6.3 times for Regular and Non-VL Players. This tends to be consistent with the demographic profile of Casual Players (see Section 2.6) which characterizes these adults as more likely to be married with children and, thus, more inclined to be involved with family obligations and related social activities.

Compared to all other adults, Regular VL Players tend to visit friends more often than family (6.8 versus 6.3 times) and, thus,

each month, visit friends more so than either Casual (5.7 times/month) or Non-VL Players (4.6 times/month). In fact, Non-VL Players are least inclined to go out to visit friends each month and are more inclined to entertain at home or to go to another family member's house.

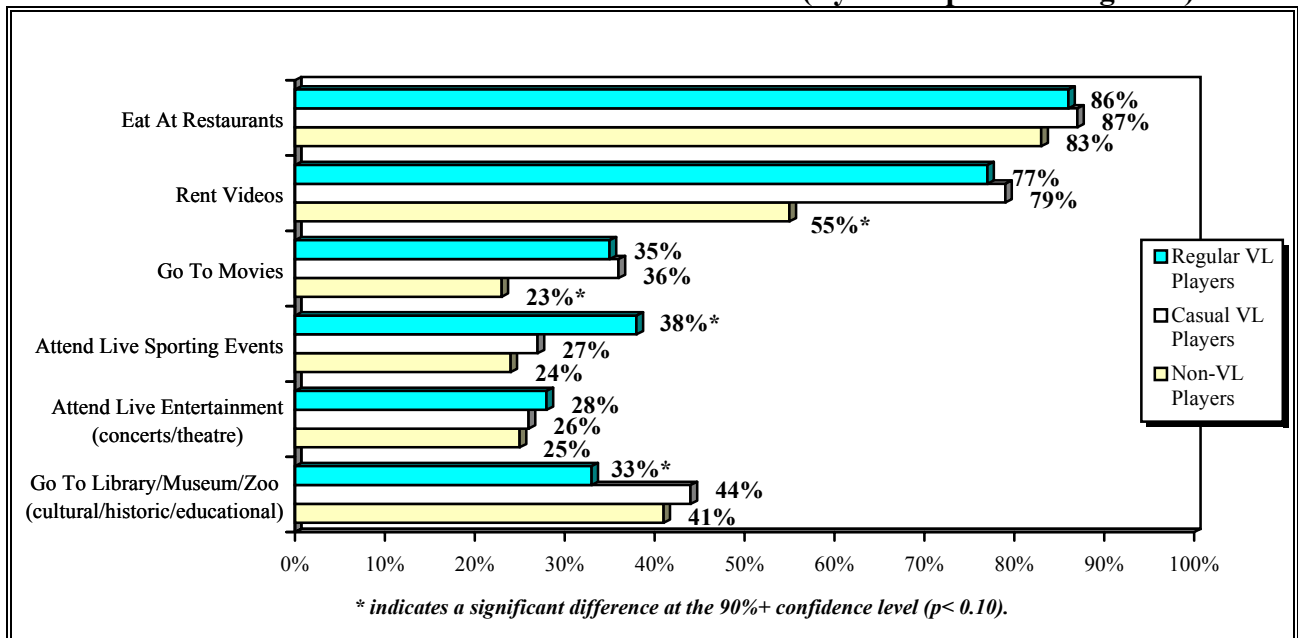
Involvement In Community Events Each Month (By VL Population Segments)



Non-VL Players are more likely to be involved in their church and community than either Casual or Regular VL Players. There are few distinctions between Casual and Regular Players in this regard. This may be somewhat surprising given the more family related profile for Casual Players. However, it appears that careers/work and busy social and entertainment schedules may provide less incentive for Casual and Regular VL Players to be more active in their church and community.

It is also noteworthy that, although Regular VL Players are more likely to be employed than Non-VL Players, in an average month, they are least likely to be traveling for either business or pleasure (44%) compared to Casual (60%) or Non-VL Players (55%).

Involvement in Entertainment Activities Each Month (By VL Population Segment)



There is no difference in the percentage of adults in any segment who eat out at restaurants. However, Regular (3.5 times per month) and Casual (3.1 times per month) VL Players typically go out to eat more often each month than Non-VL Players (2.4 times per month). Given the

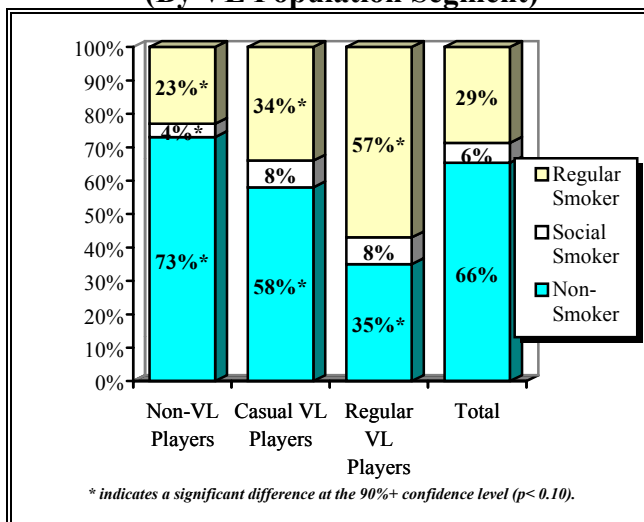
frequency Regular VL Players tend to socialize outside of their homes (69% go to bars each week), it may be surprising to find they do not eat out at restaurants more often.

Regular and Casual VL Players are both equally likely to rent video tapes (77% and 79%) and go out to view movies at the cinema (35% and 36%, respectively). Non-VL Players are less inclined to take part in either entertainment activity (55% rent video tapes; 23% go out to the movies). Similar to Casual Players (4.5), Regular VL Players rent approximately one video per week (4.1 per month). **Given that Regular Players watch TV more often than other adults, in combination with video rentals, this means, on average, they spend approximately seventeen hours per week at home in front of the television.**

Compared to other adults, Regular VL Gamblers are more inclined to attend live sporting events (38% versus 24% - 27%), and less likely to go to cultural, historic or educational sites or centres (33% versus 41% - 44%). While this tends to be influenced in part by the demographic profile for Regular Players (skewed towards males, singles, younger adults, without children), it appears that Regular VL Players are attracted to entertainment options which are more exciting and physically stimulating rather than cultural or educational pursuits. There is no difference in the percentage of adults in any of the three categories who attend live entertainment events such as concerts or theatre (although evidence (demographic profile of players) may lead one to suspect Regular VL Players are attracted to concerts (i.e., rock concerts) rather than theatre, ballet or the symphony).

2.4.3 Smoking Habits

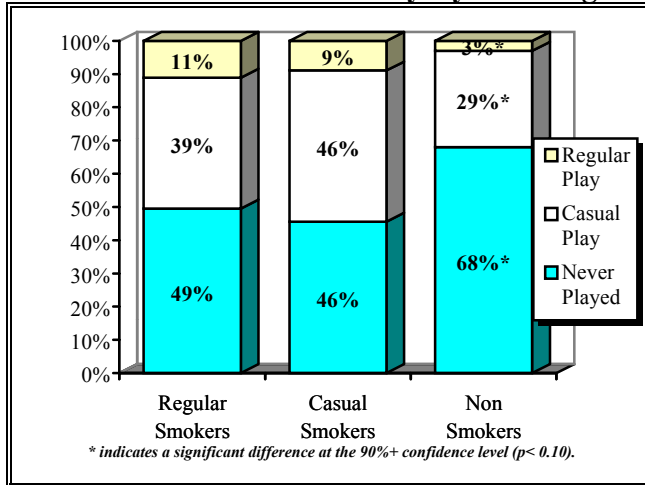
**Percentage Who Smoke Cigarettes
(By VL Population Segment)**



Overall, approximately 29% of adults in Nova Scotia currently report they smoke cigarettes on a regular basis, with an additional 6% characterized as social smokers who only “light up” on a part-time basis in social situations or when they are drinking. **Approximately two-thirds (66%) of all Nova Scotian adults are non-smokers, yet only 35% of Regular VL Players fall into this category. Undoubtedly, there is a strong relationship between VL play and smoking.**

Over half (57%) of Regular VL Players smoke on a regular basis which is significantly higher than for either Casual (34%) or Non-VL Players (23%). Interestingly, Casual Players are more inclined to smoke on a regular and social basis than Non-VL Players, although not to the extent noted for the Regular VL Players.

Penetration of VLT Play By Smoking



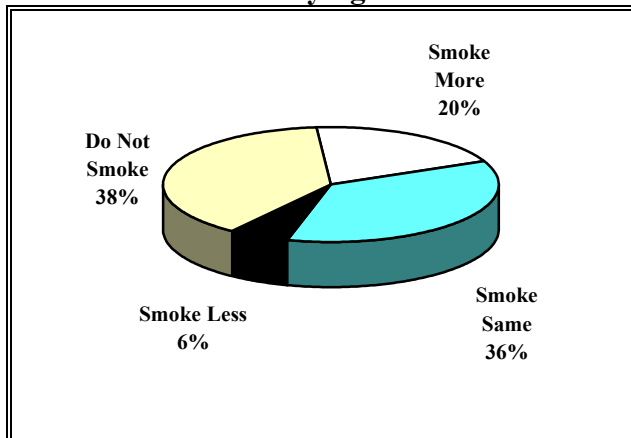
This relationship between smoking and VL play **does not mean that smokers are more likely to play video lottery games.** In fact, only 11% of all smokers in Nova Scotia are Regular VL Players.

The association is most likely due to the tendency for fewer non-smokers to go to bar locations on a regular basis (25% versus ≈40% of smokers). More than half of all social smokers (58%) and 35% of regular smokers are in bar locations once a month or more. In fact, 40% of all those who are in a bar once a week or more are regular smokers. Not surprisingly, this

would suggest more smokers have access to play of VLT's in Nova Scotia than non-smokers since the majority of VLT's are distributed in bar locations throughout the province. The restrictions instituted during the past decade on smoking in public places may have encouraged more frequent bar patronage for smokers. As the locations where smoking was permitted steadily decreased (theatres, restaurants, shopping malls), regular smokers may have stopped going to "smoke free" locations for entertainment purposes as often in favour of heading somewhere they could smoke freely. Given the amount of time Regular Players typically devote to VL play (≈1 hour and 9 minutes each time they play), it is probably less uncomfortable for another smoker to be sitting in a "smoky" environment for extended time periods.

In general, 62% of Regular VL Players smoke while they are playing VLT's, and 20% smoke more than usual when playing the games. This means almost one-third (32%) of those Regular VL Players who smoke are smoking more heavily while playing video lottery games.

Smoking Habits of Regular VL Players When Playing VLT's



Only 6% smoke less (10% of those Regular VL Players who smoke). Thus, **for the majority of Regular Players (including those who do not smoke), there is no impact on their smoking patterns while playing the games (74%).**

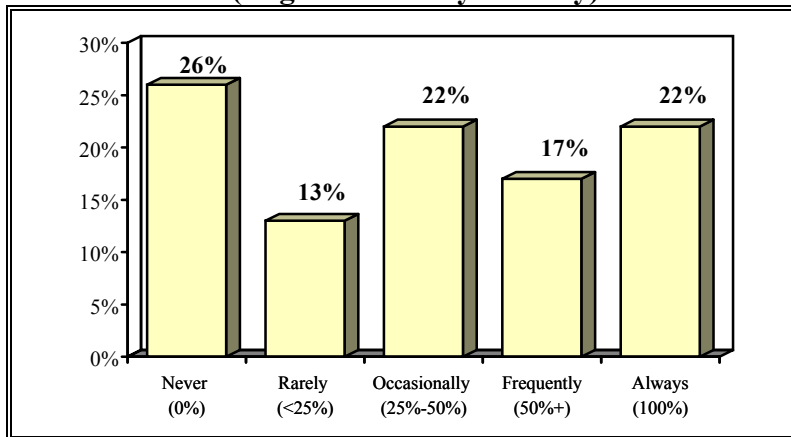
Given the tendency for Regular VL Players to be smokers, it might be speculated that limiting the machines to smoke free areas may reduce the amount of time Regular Players would devote to play of the games. It may be argued that such a move might serve to counter the

greater access smokers have to the machines by virtue of where the VLT's are located

(bars/pubs/lounges). To some extent, this may be effective in reducing play for social players, however, it is noteworthy that the incidence of problem VL play does not differ significantly for those Regular VL Players who smoke (18%) or are non-smokers (14%). (Since smokers comprise a larger proportion of Regular VL Players, they will also make up a larger proportion of Problem Players, but they are no more likely than non-smokers to develop problem play of the games (see Section 3.0).

2.4.4 Drinking Habits

Frequency of Drinking Alcohol When Playing VLT's
(Regular VL Players Only)



For the most part, Regular Video Lottery Players are not drinking frequently or heavily when they play the games; 26% never drink alcoholic beverages when they are playing, primarily because they are non-drinkers (19%), either by choice or because they are on medication for which alcohol is contra-indicated. Hence, 19% of Regular Players do not normally drink alcohol and,

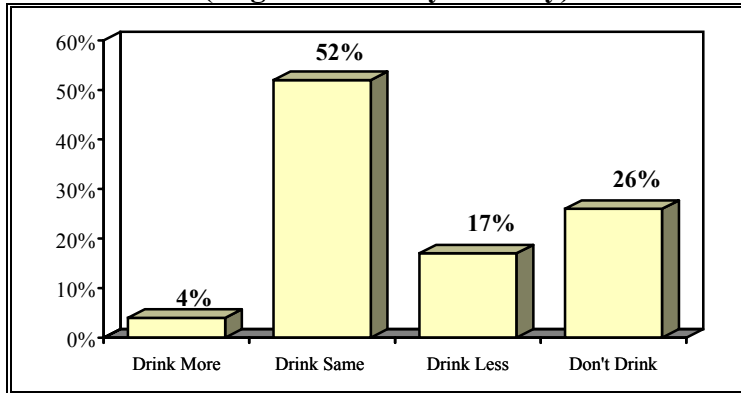
therefore, do not drink when they play. Only 1% of Regular Players avoid alcohol while playing because they tend to spend too much time or money and may “*continue to play even when [they] should stop.*”

One percent (1%) of players (n=8) indicated they play at locations which do not serve alcohol which suggests regular play at illegal locations for these players since the machines are currently restricted in Nova Scotia to licensed establishments.

Only 2% of Regular Players specifically mentioned a desire to “*put the money into the machines rather than drink.*” “*I only bring so much money with me and it's not spent on drinks.*” “*When I go to drink, I drink, but when I go to play, I play.*” “*I just don't drink when I play. I'd rather spend it on VLT.*”

For the 74% of Regular VL Players who do drink while playing VLT's, almost half (47%) do so only rarely or on an occasional basis, essentially drinking less than 50% of the time they are playing. Only 22% of Regular VL Players always drink and 17% frequently partake of alcoholic beverages during VLT play.

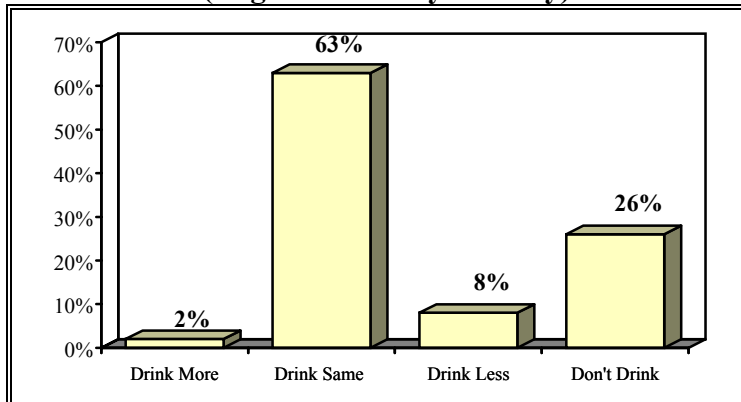
**Impact of VLT Play on Drinking
(Regular VL Players Only)**



who drink more. **This suggests that for a significant portion of Regular VL Players, the games actually lead to decreased alcohol consumption.**

For those who do imbibe while playing, only 4% tend to consume more alcohol than they would normally drink versus 17% who actually drink less. Those who **rarely** drink while playing are significantly more likely to report that they drink less when playing the machines (34% versus ≈18%) than those Regular Players who drink more frequently. However, there is no difference among Regular Players in terms of those

**Impact of VLT Losses on Drinking
(Regular VL Players Only)**



Even when losing, VL Players are not inclined to drink. In fact, there are four times as many who will drink less when they are losing, as compared to those who consume more (8% versus 2%). It appears that, when losing, Regular Players are more inclined to allocate funds to continue play of VLT games (i.e., chase losses) rather than for alcohol, food or other expenses (see Section 3.0 for further analysis).

All respondents were asked to indicate whether the amount of alcohol they consume affects their play. Only 24% felt their drinking impacts their play of VLT's. The primary complaint by 12% of players is attributed to spending more money than planned or desired: *"The more I drink, the more I spend."* *"I think they put them in bars on purpose so you spend more."* *"Makes me probably spend more than I should."*

There are 11% of players who specifically note that they tend to play at higher bet levels than usual and take more risks: *"I take more of a gamble and increase bets when I've had a lot to drink."* *"You get more cocky, more chances are taken--for example, you up your bets more often and higher than if you were not drinking."* *"I start betting max--I still stop after \$20.00, I just spend it faster."*

For 5% of Regular Players, alcohol affects their attention and ability to focus on the game: *"I wasn't paying attention to what I was doing."* *"I'm sloppy--can throw away the wrong card."* *"I can't watch the little things spinning around--not focused."*

There were 20% who specifically mentioned they become “*too carefree and don’t worry about expenditures*” and 1% who noted they “*can’t hit the stop button effectively because their reflexes are too slow.*”

In general, Regular VL Players do not play when they feel they have had too much to drink. In fact, only 24% indicated that they have ever played the games when they would have considered themselves to have been intoxicated (had too much to drink). This suggests that Regular VL Players want to be focused on the game and that they believe, for the most part, drinking either “*eats up*” resources that can be used for VL gambling or that it interferes with their ability to play and manage their play of the games.

2.5 Expenditure Profile

It will be recalled that, generally, Regular VL Players are more inclined to be involved in other gambling activities available in Nova Scotia and, typically, spend more than other adults when they gamble (see Section 2.2 - Gambling Activities Profile). Furthermore, Regular Players tend to be socially active outside the home and appear to invest more time and money in entertainment activities, particularly as it relates to gambling. These findings lead to a number of questions regarding expenditures by Regular Players. For example, do Regular VL Players spend more than other adults on entertainment, gambling, in general, and video lottery, specifically; or do Regular VL Players simply allocate more of their entertainment budget to gambling and VL play and, thus, are spending less money than other adults on non-gambling entertainment?

To understand the impact of their VLT expenditures, it is necessary to comparatively examine spending activity by all adults within the context of total gambling and entertainment expenditures in Nova Scotia.

2.5.1 Revenue & Expenditure Calculations

All respondents participating in the surveys were asked to report:

- ♦ the amount they typically spend on video lottery gaming each week or month;
- ♦ monthly entertainment expenditures;
- ♦ the actual amount spent during the last month on the various other gambling activities available in Nova Scotia.

In order to derive accurate estimates of gambling expenditures and revenue, all respondents were asked to provide the out-of-pocket amount spent on each gambling activity (excluding reinvestment of any winnings). It has been found in previous research related to gambling that by having players note the actual amounts they spend on a per time or per purchase basis, the estimates obtained will more accurately reflect actual spending behaviour and net sales figures. This is particularly relevant for video lottery gaming.

Given the continuous nature of play and easy accessibility of video lottery gaming, it is difficult for players to keep track of their expenditures. This is one of the key factors contributing to players' problems in managing their VL play. Consequently, weekly or monthly estimates by players as to the amount they spent on VLT gaming will often vary from actual expenditures. However, players find it relatively easy to provide out-of-pocket estimates of expenditure on a per play basis, as it is more relevant to their actual play behaviour and experience.

- ♦ *"I usually put \$20.00 into the machine when I sit down and I play until I lose it;"*
- ♦ *"I spend \$5.00, one loonie at a time;"*
- ♦ *"It varies, but usually I end up spending about \$50.00 of my own money every time I play the machines--sometimes you get really lucky though."*

By applying per play estimates to the actual number of times they played in the last month (i.e., how many times in a location with VLT's; how many times played either planned or on impulse), it is possible to **derive expenditure estimates based on amount spent rather than amount wagered**. This has proven to yield more accurate estimates of net revenue for video lottery gaming.

Thus, instead of relying on a player's perceptions of what he/she is spending, the estimate is derived by breaking expenditure into its component parts:

$$\text{Monthly Expenditure} = \left[\begin{array}{c} \text{Out-Of-Pocket} \\ \text{Expenditure} \\ \text{Per Play} \end{array} \right] * \left[\begin{array}{c} \text{Average \#} \\ \text{Of Plays} \\ \text{Per Visit} \end{array} \right] * \left[\begin{array}{c} \text{Number of Times} \\ \text{Played At Establishment} \\ \text{Over The Past Month} \end{array} \right]$$

When expenditure estimates based on actual play for the last month (month prior to data collection) are projected to obtain annual revenue estimates, the figures will be more accurate on an aggregate and segment basis, but may over or under estimate actual expenditures on an individual basis. This is due to the fact that some players will have played more than usual in the last month, but it will be balanced off by those who have played less than usual. In any given month, it can be expected that this same fluctuation will occur within the player base and, thus, overall, revenue projections tend to be reasonably accurate.

Given this method of deriving expenditures, it is not necessary to introduce "capping" of those amounts which ordinarily would be considered outliers. (However, when profiling within certain player segments (e.g., demographic categories such as age, gender, etc.) , all VL expenditures are capped at a maximum of \$2,000.00 per month, in order to minimize the influence of extreme cases on mean estimates at a segment level.)

The total amount spent on all entertainment activities including gambling was estimated for each respondent by combining the following:

- derived VLT expenditure;
- sum of monthly expenditures on all other gambling activities;
- estimated monthly entertainment expenditures (excluding gambling).

2.5.2 Provincial Overview Of Entertainment & Gambling Revenue

	Average Expenditure† Per Adult	Estimated† Monthly Revenue (\$000)	Estimated Annual Revenue (\$000)	% Of Total Entertainment/ Gambling Revenue
Video Lottery Revenue	\$ 14.39	\$ 9,778.00	\$ 117,337.00	11.5%
Other Gaming/Gambling Activities	\$ 27.31	\$18,557.00	\$ 222,687.00	21.9%
Total Gambling	\$ 41.70	\$28,335.00	\$ 340,024.00	33.4%
Other Entertainment	\$ 83.09	\$56,460.00	\$ 677,521.00	66.6%
Total Entertainment & Gambling	\$124.79	\$84,795.00	\$1,017,545.00	100%

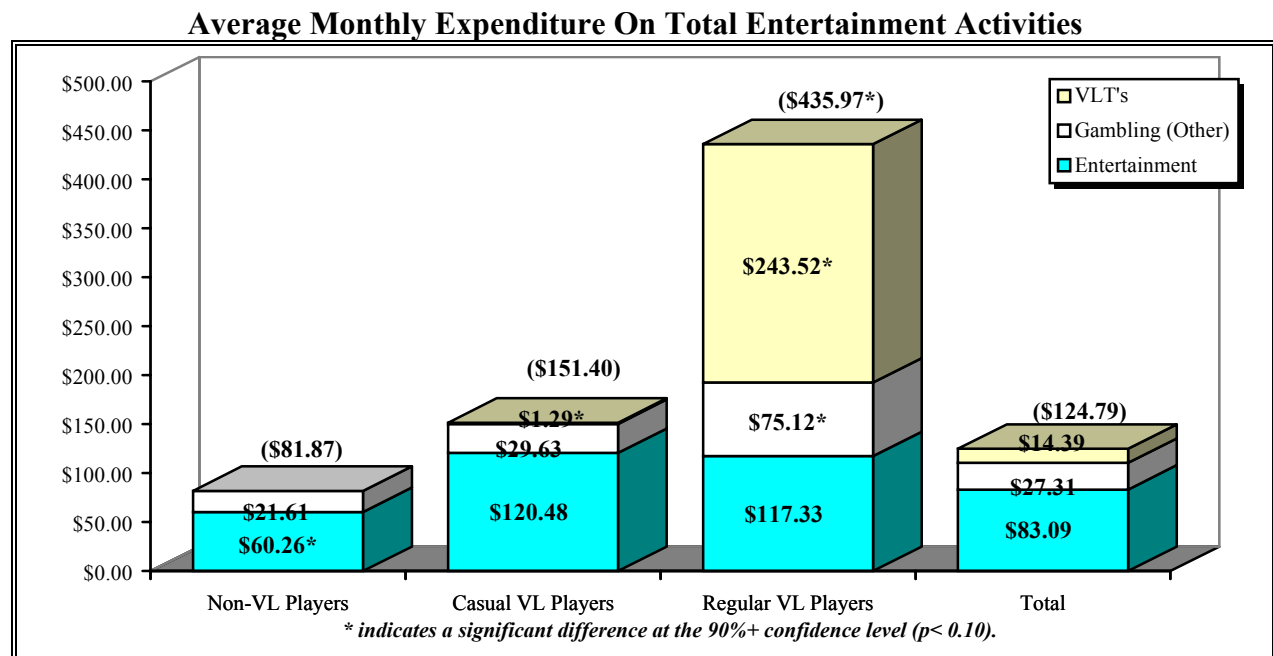
† Based on adults 19 years or older = 679,505 adults in Nova Scotia (Source: Statistics Canada 1996 Estimates)

On average, adults in Nova Scotia spent approximately \$124.79 each month on entertainment and gambling activities. Gambling specifically comprises approximately one-third of their total entertainment budget, with video lottery accounting for 11.5% of all general entertainment expenditures in the province.

The results suggest that net revenues for VLT gambling in Nova Scotia for 1997/98 will be approximately \$117,336,923 which represents an estimated increase of approximately 10.7% over last year (source: NS Alcohol & Gaming Authority 1996/97: \$105,929,806). The 1997/98 Annual Report has not yet been distributed, however, the 1997/98 figure for VLT net revenue released by the Nova Scotia Alcohol & Gaming Corporation was \$120 million.

In total, it was found that **Nova Scotians spent approximately \$340 million dollars on gambling in the province over the last year** (however, it should be emphasized that expenditure refers to out-of-pocket expenditure (net revenue), as opposed to amount wagered). This means that video lottery will have contributed approximately 34.5% of all gambling revenue after prizes have been paid. Video lottery, typically, returns a higher proportion of net revenue to the province, as compared to other regulated gambling and, thus, the rate of return to the province by VLT's will be closer to 50% of all gambling revenue in the province.

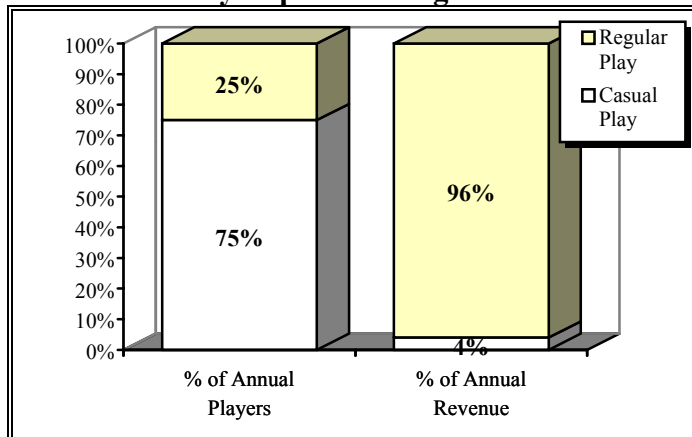
2.5.3 Expenditures By VL Population Segment



Comparatively, **Regular VL Players**, on average, are spending almost three times as much money as **Casual VL Players** each month on entertainment and gambling activities (\$435.97 versus \$151.40) and five times as much as **Non-VL Players** (\$435.97 versus \$81.87).

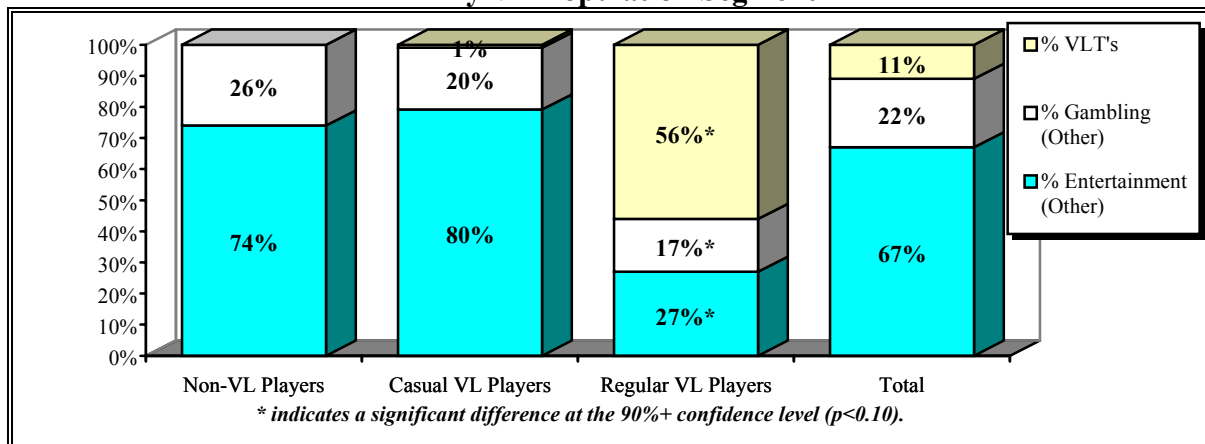
There is no difference in the amount Casual and Regular VL Players spend on general entertainment (\$120.48 versus \$117.33). Therefore, the primary difference between expenditures in these segments is **due entirely to gambling expenditures by Regular VL Players**. By definition, video lottery play is substantially higher for this group, with **Regular VL Players, on average, spending \$243.52 each month on video lottery play**, as compared to only \$1.29 per Casual Player.

**VLT Revenue Contribution
By Population Segment**



When only those adults who have played video lottery games in the last year are considered, it can be estimated that approximately 23% of all adults in Nova Scotia played video lottery games at least once. Casual Players comprise approximately 75% of all those adults who played, yet contributed only 3% of total revenue for video lottery. This means that **Regular VL Players make up only 25% of all annual VL players, yet contribute approximately 96% of the revenue for the games.**

**Percentage of Monthly Expenditure Spent On Gambling Versus Non-Gambling
By VL Population Segment**



To understand differences in how adults are allocating their expenditures (regardless of amount spent), the proportion each group spends on VLT gambling, other gambling and non-gambling activities were calculated and compared.

Despite the tendency for **Casual VL Players**, on average, to spend twice as much as **Non-VL Players** on non-gambling entertainment (\$120.48 versus \$60.26), both groups are spending a similar proportion of their entertainment dollars on gambling (20% versus 26%) and non-gambling activities (80% versus 74%). Conversely, **Regular VL Players dedicate 73% of all their monthly entertainment expenditures to gambling activities**. Interestingly, they spend a

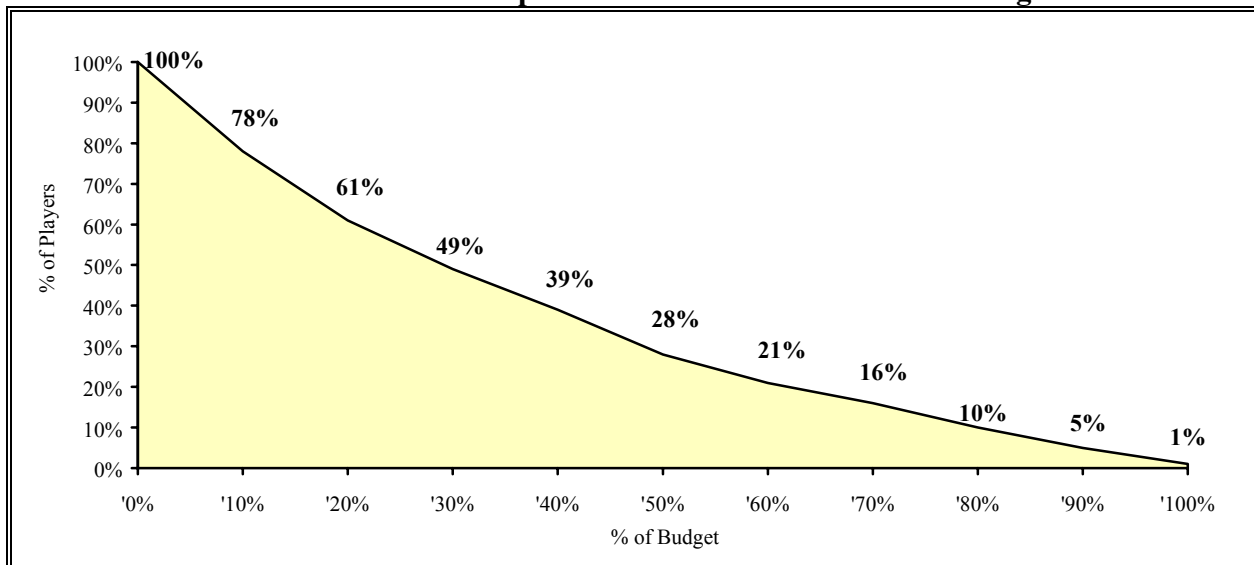
similar percentage of their entertainment budget, as other adults, on other gambling, excluding VLT's (17%). **In fact, compared to Non-VL Players, Regular VL Gamblers spend a smaller proportion of their entertainment dollars on other gambling activities (17% versus 26%).** However, they spend more than half (56%) of their entertainment dollars on video lottery gambling.

Despite the greater tendency for Regular VL Players to be in licensed locations in order to play the machines, it appears they are not spending their money on alcohol, food, or other extraneous expenses. Given their propensity to be involved in social activities outside of their homes (see Section 2.4 - Social & Leisure Activities Profile), the results suggest that Regular VL Players may be spending less on non-gambling entertainment than would be the case if they were not devoting such a significant portion of their "disposable income" or entertainment budget to VL play. Undoubtedly, video lottery gambling is an important and sizable part of Regular VL Players' entertainment. If these adults were not spending such large amounts of time and money on video lottery gaming, the results suggest, in many cases, they may be more inclined to be using their resources for other entertainment based activities (switching their VLT expenditure to other activities, in particular, other gambling activities).

2.5.3 VLT Expenditure For Regular VL Players

On average, Regular Players dedicate 56% of all their entertainment expenditures to VLT's and 73% collectively to gambling activities. However, within the Regular VL Player base, there are distinct differences among the players in terms of VLT expenditure and the proportion of entertainment dollars allocated to VLT's.

**Distribution Of Regular Players By Amount
Of Entertainment Expenditure Allocated To VL Gambling**



Almost half (49%) of all Regular VL Players spend less than 30% of their entertainment expenditures on video lottery gambling, with a total of approximately 72% allocating less than 50% of their “*fun money*” to play of the machines. This means that approximately 30% of Regular VL Players are spending the majority of their entertainment dollars (50%+) on video lottery gambling. To gain additional insight as to the impact of this behaviour on expenditure patterns, all Regular Players were segmented into one of three groups, based on proportion of their entertainment dollars devoted to video lottery play:

- ♦ GROUP 1 - Low/Social Players (spend <30% of entertainment expenditures on VLT’s);
- ♦ GROUP 2 - Medium Players (spend 30% - 50% of entertainment expenditures on VLT gaming);
- ♦ GROUP 3 - High/Heavy Players (spend over 50% of entertainment expenditures on VLT’s).

**Average Monthly Expenditures By Amount
Of Entertainment Expenditure Allocated To VL Play**

	Regular Players (% spent on VLT’s)		
	Spend <30% (n=348)	Spend 30%-49% (n=149)	Spend 50%+ (n=213)
% of Regular VL Players	49%	21%	30%
Average Amount Spend Per Month:			
VLT’s	\$ 29.62	\$138.05	\$665.03
Other Gambling	\$ 62.38	\$ 91.77	\$ 85.39
Other Entertainment	\$142.20	\$105.25	\$ 83.80
Total	\$234.20	\$335.07	\$834.22

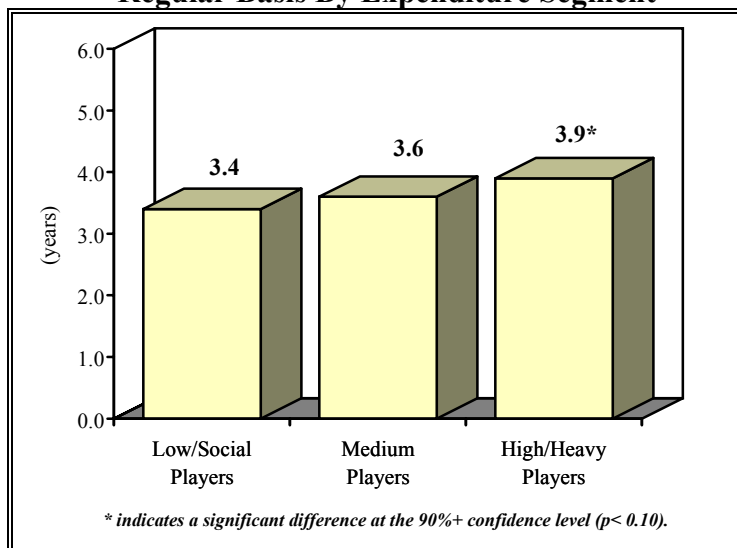
Those Regular Players who spend more than 50% of their entertainment expenditures on VLT’s are, typically, spending two to four times more per month than other Regular VL Players, with, on average, 80% of their expenditures dedicated to video lottery play. Comparatively, those Regular VL Players who allocate less than 30% of their monthly entertainment budget to play of video lottery (low/social players) are spending only slightly more than Casual Players in Nova Scotia each month on any entertainment and/or gambling activities (\$234.20 versus \$151.40). The difference in expenditures between these two groups is entirely due to higher gambling expenditures by the Regular Players, with both spending a similar amount on non-gambling entertainment (\$142.20 versus \$151.40).

Not surprisingly, as VLT expenditure goes up, there is a decline noted in the amount spent by players on non-gambling activities. Those who allocate less of their entertainment funds to VLT gaming spend over 1.5 times more money on non-gambling entertainment activities, as compared to those who spend the majority of their funds on VLT’s (\$142.20 versus \$83.80). In fact, Social VL Players only spend approximately 40% of all their expenditures each month on gambling versus 69% for those in the mid range and 90% for the heaviest VL players. Interestingly, there is no difference between Regular Players in the medium and heavy VL segments in terms of what they spend on other gambling activities (\$91.77 versus \$85.39). Rather, it is expenditure on VLT’s which distinguish these two groups of Regular Players (\$138.05 versus \$665.03).

It appears that as Regular Players increase the proportion of their entertainment funds spent on video lottery, the amount spent on VLT's also goes up exponentially such that, on average, medium players spend 4.7 times more than lighter players (\$138.05 versus \$29.62) and heavy players spend 4.8 times more than medium players (\$665.03 versus \$138.05).

It could be argued that spending behaviour for VLT's may develop over time. It may be that as Regular Players are exposed to play, they initially start to divert other spending to VLT's and then begin augmenting their expenditures (spend additional monies) as they continue to play at increasing levels.

Length of Time Playing VLT's On A Regular Basis By Expenditure Segment

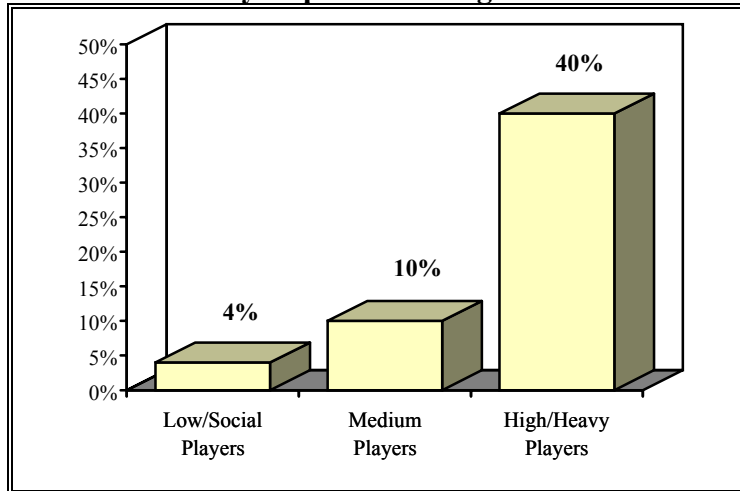


To some extent, this is true. There is a significant difference in the length of time adults in the three expenditure segments have been playing video lottery on a regular basis. On average, heavy players have been playing VL games regularly for 3.9 years versus only 3.4 for the lighter players.

However, the differences among the segments are not large enough to offer a compelling explanation of the differences in playing patterns among the players. For example, 18% of heavy players have only

started playing on a regular basis within the last year. Conversely, 19% of light/social players have been playing regularly for five or more years. Obviously, frequency of play, amounts wagered, bet strategies and other factors play a role in how quickly or slowly problems may develop if at all. A counter argument would suggest that as players gain more experience with video lottery play, some may learn to control or manage their expenditures. Thus, at different points in their regular VL gambling history, players may have moved into and out of different play levels (e.g., spending more heavily at some points and less so at other times).

**Incidence Of Problem VL Play
By Expenditure Segment**



While both high expenditures and a greater tendency for players to allocate more of their entertainment expenditures to VLT play are strongly associated with problem VL play, the relationship is not perfect. Approximately 40% of heavy players can be currently categorized as Problem Players; 10% of medium and only 4% of social/light players.

This means for the majority of heavy players (60%), their current VL play is not a problem for them. Likewise, despite the relatively

lower amount spent by light/social players, there is still a small, yet significant, group (2% of all Regular VL Players; 12% of all Problem VL Players) within this segment experiencing difficulty with their play. Thus, expenditure levels for VLT's are strongly associated with problem VL gambling, yet cannot be used as a sole indicator of problem VL gambling.

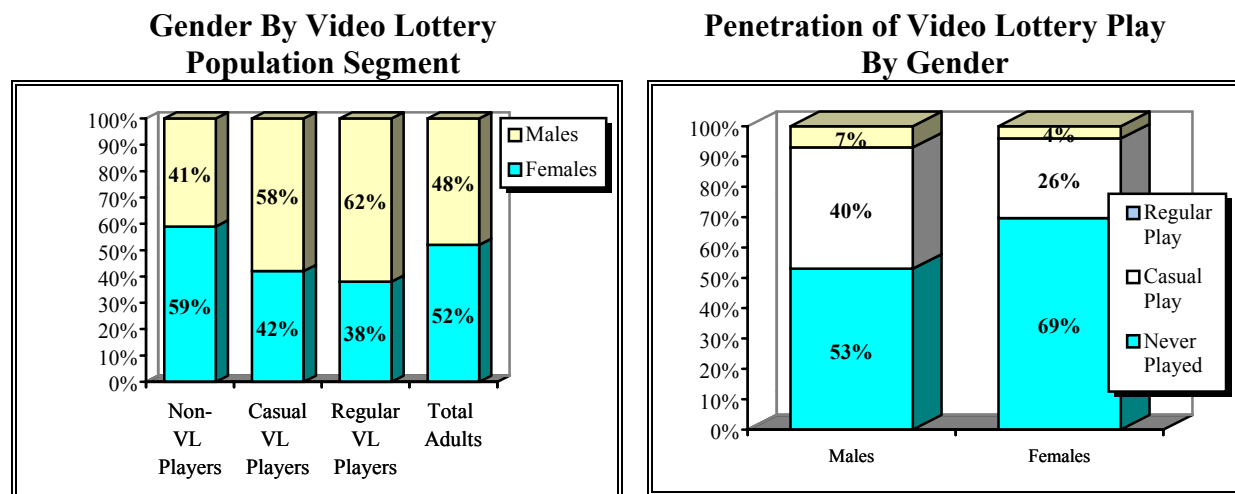
2.6 Demographic Profile Of VL Play In Nova Scotia

To identify “*who*” is playing video lottery games in Nova Scotia, the three population segments were profiled in terms of their demographic characteristics and associated play behaviours. Specifically, the demographic analysis identifies those adults in Nova Scotia who are most likely to have:

- tried VLT games;
- adopted casual VL play;
- adopted regular VL play.

Any differences in adoption are examined in greater detail to develop a more comprehensive understanding of the demographic factors influencing, or associated with, video lottery gambling. The information will assist in defining and targeting those segments in the population most likely to benefit from information, or support/assistance, in controlling and/or managing their VL gambling.

2.6.1 Gender

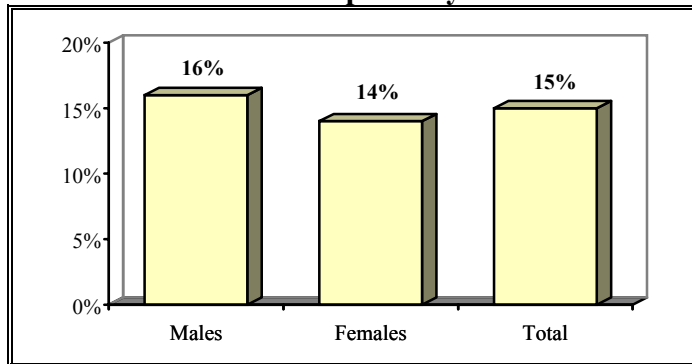


Men comprise just under half of all adults in Nova Scotia (48%), yet, they represent 62% of the Regular VL Player base in the province.

Conversely, women comprise the majority of Non-VL Players (59%), with 69% having never tried the games, as compared to 53% of men.

Almost half of all adult males (47%) have tried video lottery games at some time in the past. While the majority of these men play on a casual basis, 7% ($\approx 3.6\%$ of all Nova Scotian adults) are regular monthly players versus only 4% of women ($\approx 2.2\%$ of adults in Nova Scotia).

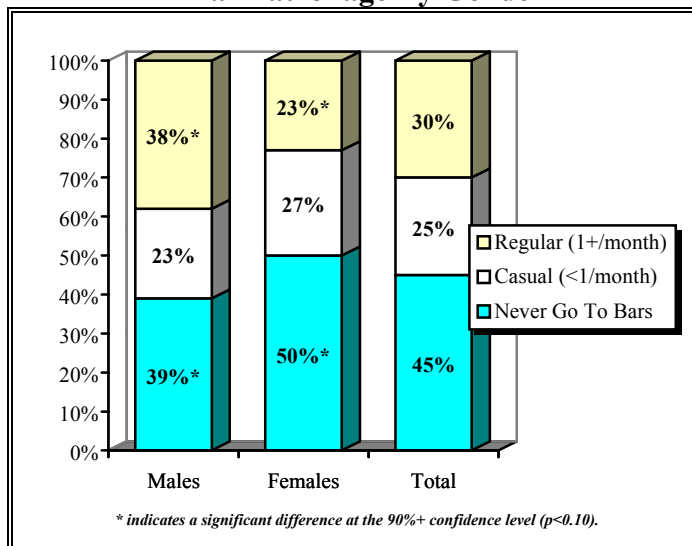
Continued Adoption By Gender



It is noteworthy that, although only approximately 31% of women have tried VL gaming, the adoption rate (i.e., those who become regular players after trial) is similar for both men (16%) and women (14%). This suggests that the principal differences between play levels for men and women is largely attributable to exposure or access to play, with women less likely to have tried VL gaming and, thus, less

likely to become Regular Players. However, once they have tried the games, women are just as likely as men to take up regular play of the games.

Bar Patronage By Gender



In an average month, men are twice as likely as women to be in locations which have VL machines (4.6 versus 2.3 times). Typically, 60% of all those who are in bar locations or licensed establishments on a regular monthly basis are men and they comprise nearly three-quarters (73%) of all weekly bar patrons.

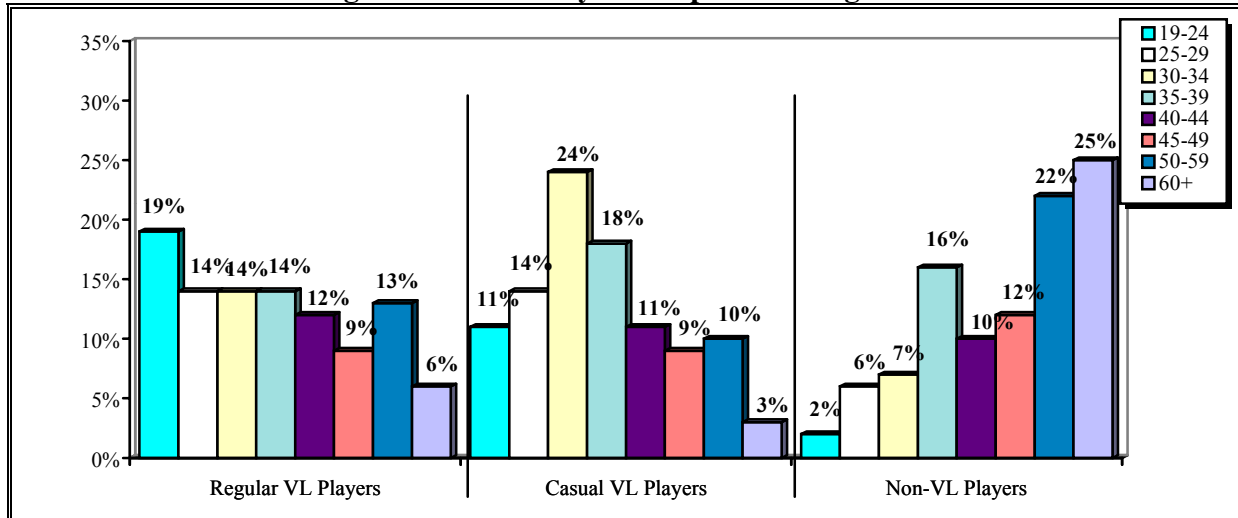
Although half of all women do not go to bars, pubs, clubs or lounges at all, even when they do go, they are more inclined than men to be casual (53% versus 39%), rather than regular bar patrons (47% versus 61%). Therefore,

opportunities for regular play are considerably lower for women, as compared to men. If the machines were not restricted to licensed establishments (as was the case prior to January, 1993, when they were available in corner stores in Nova Scotia), it could be expected that women would comprise a much larger proportion of the regular player base for VL gaming than they now do. **Therefore, given the current distribution strategy, males are more likely to be targeted for VL gambling in Nova Scotia.** On average, women who are Regular VL Players tend to play the games just as often as men when they are in locations which have the machines ($\approx 56\%$ of the time), but because they are in these locations less often, they account for fewer of the players.

2.6.2 Age

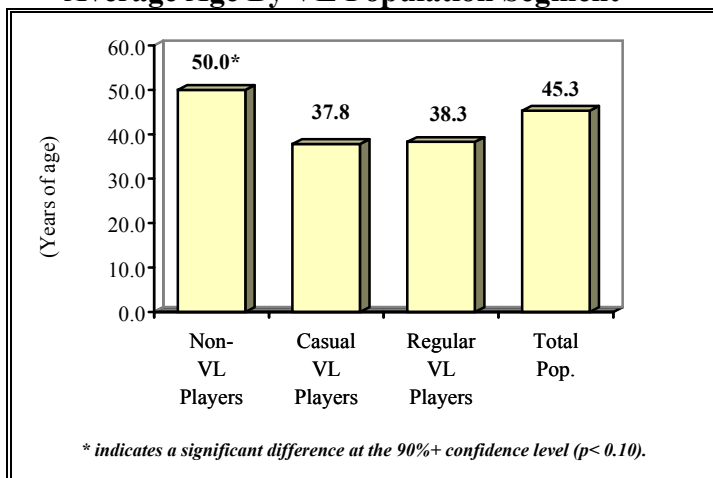
All respondents were asked for their year of birth, in order to derive accurate age estimates. Adults were then segmented into age categories for descriptive and segmentation analysis. However, when appropriate, actual age of the respondent is used for analysis.

Age Distribution By VL Population Segment



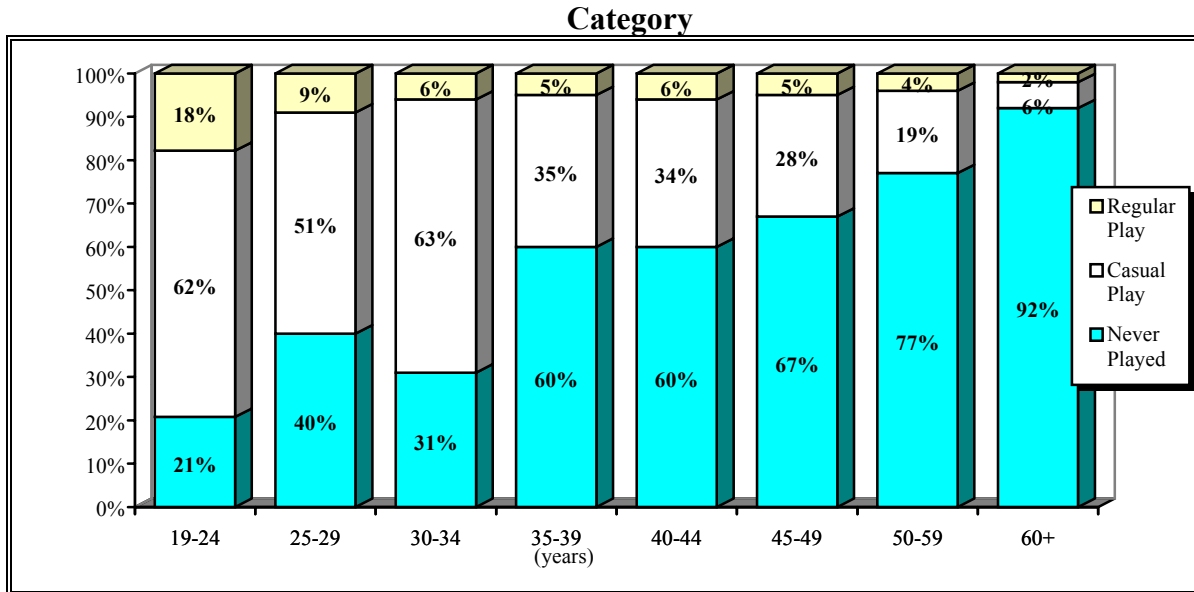
There is a strong inverse relationship between age and play of VL machines. Almost half of all Casual (49%) and Regular VL Players (47%) are under age 35, with approximately two-thirds under 40 years of age. There are no significant differences among Casual and Regular VL Players, with the exception that the youngest adults (aged 19 - 24 years) comprise more of those playing video lottery games on a regular basis (19% versus 11%), whereas, those aged 30 to 34 years account for a larger proportion of Casual Players (14% versus 24%). This most likely reflects the impact of lifestyle factors, with younger adults more frequently in locations which have VL machines than those aged 30 to 34 years (7.1 versus 3.6 times/month).

Average Age By VL Population Segment



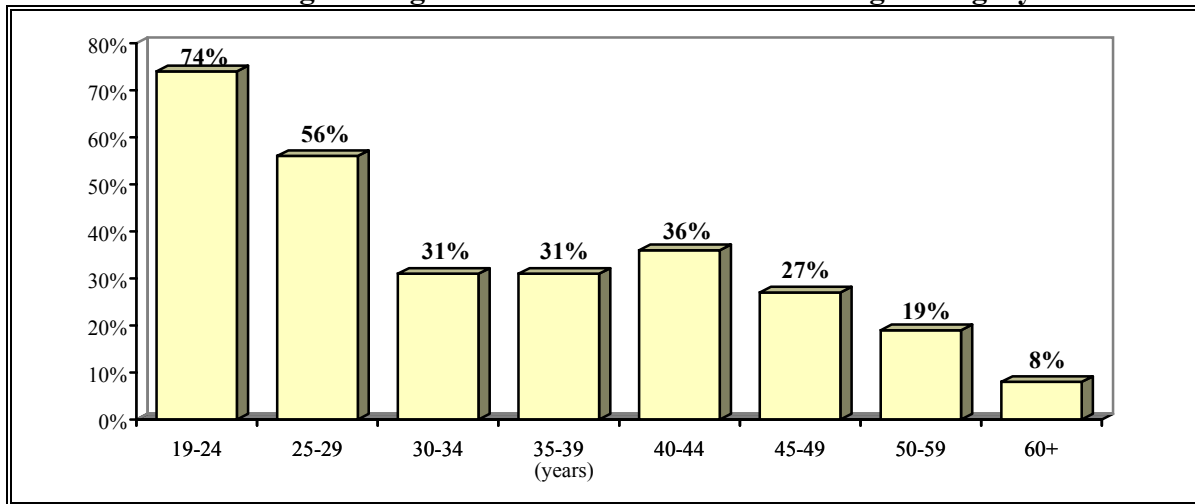
Non-VL Players tend to be significantly older, on average, than their “VL playing counterparts.” In fact, 45% of non-VL players are 50 years of age or older, as compared to only 13% of Casual Players and 19% of Regular Players.

Penetration of VL Play By Age



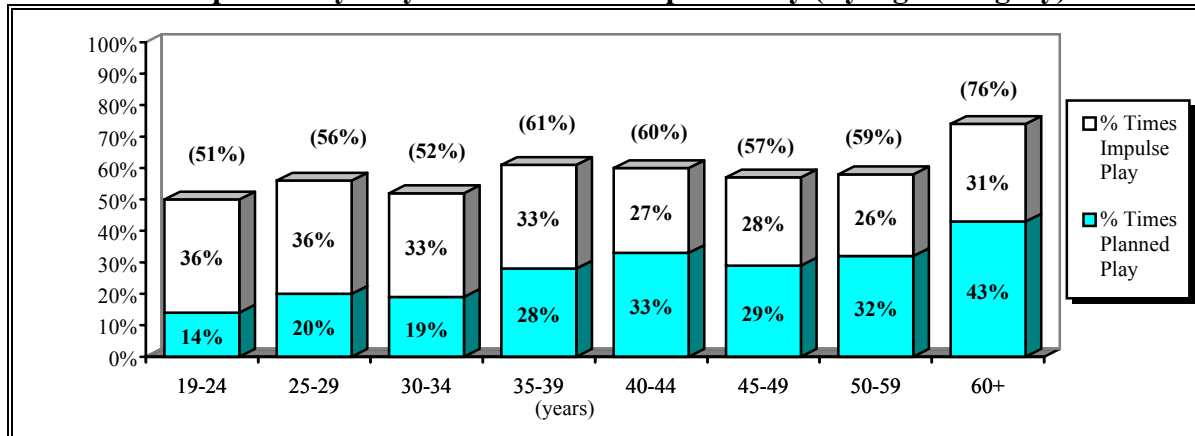
Given the greater propensity for younger adults to be frequenting locations which have video lottery gaming, it is not surprising they are more inclined to have tried VL gambling or have a comparatively higher incidence of regular VL play. Approximately 80% of all those aged 19 to 24 years have tried VL gambling at some time, with 18% playing on a regular basis. This is not particularly surprising given that 74% of all adults in this youngest age category are currently in bars or licensed establishments once a month or more.

Percentage of Regular Bar Patrons Within Each Age Category



The results suggest that the majority of differences in video lottery play among the three VL population segments are largely due to accessibility and the current distribution strategies for VLT's. Obviously, there is a relationship between how often someone goes to a licensed establishment and their likelihood of playing VLT's. For example, 85% of adults over 59 years of age do not go to bars, clubs, pubs or lounges, and only 8% go on a regular, monthly basis. This tends to correspond with the 8% of older adults who have ever tried video lottery.

Penetration of Time Regular VL Players Are In A Location To Specifically Play VLT's Versus Impulse Play (By Age Category)

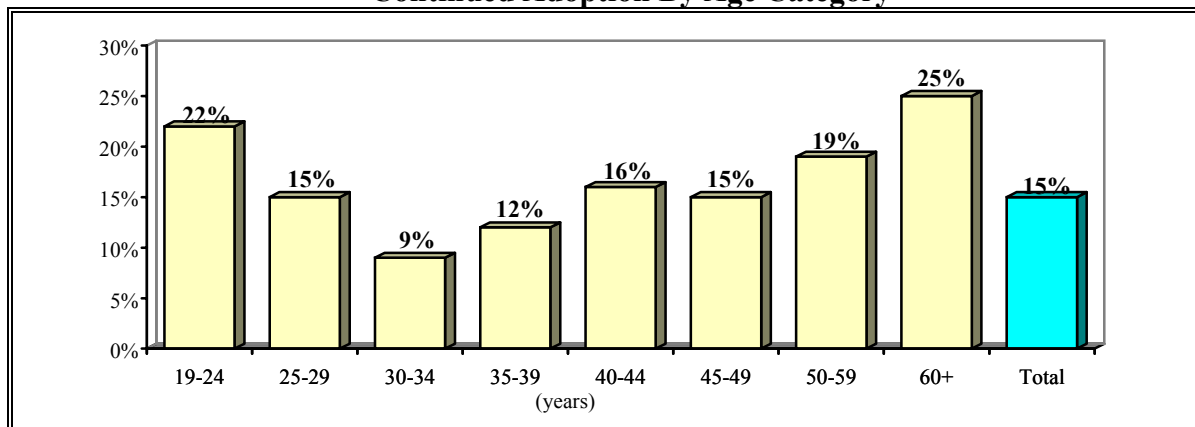


Despite the high tendency for young adults to regularly be in locations which have the machines, only 14% of the times they go to these locations are to specifically play video lottery. For the most part, young adults are at the bars for other social reasons, with the majority playing on impulse primarily for entertainment purposes. This contrasts sharply with those Regular Players 60 years or older who tend to play VL games the majority of times they are in a location which has the machines (76%). In 43% of the cases, these oldest players are only there specifically to play video lottery.

Although the average number of times they play when they are exposed to VLT gambling is fairly similar for all adults under 60 years of age (51% - 61%), undoubtedly, those over 35 years of age are more inclined to be in these locations because they are seeking out the machines. **This suggests that video lottery play is a more incidental activity for most players under 35 years and more of a deliberate or planned activity for adults 35 years and older.**

Despite differences in exposure to VLT's, a similar percentage of Regular Players within all age categories will play the games on impulse when they are in locations which have the machines. Generally, Regular Players will play on impulse approximately one-third of the time they are exposed to the machines.

Continued Adoption By Age Category



Interestingly, continued adoption of regular VL play by those who have ever tried the games tends to be highest for those at either end of the age continuum. Adoption rates for those 60 years or older (25%) and 19 to 24 years (22%) tends to be significantly higher than for those between 30 and 39 (9% - 12%) years of age. Therefore, **while older adults are less likely to be exposed to VL gambling, they are just as likely (if not more so than some other age segments) to take up regular play once they have tried the games.**

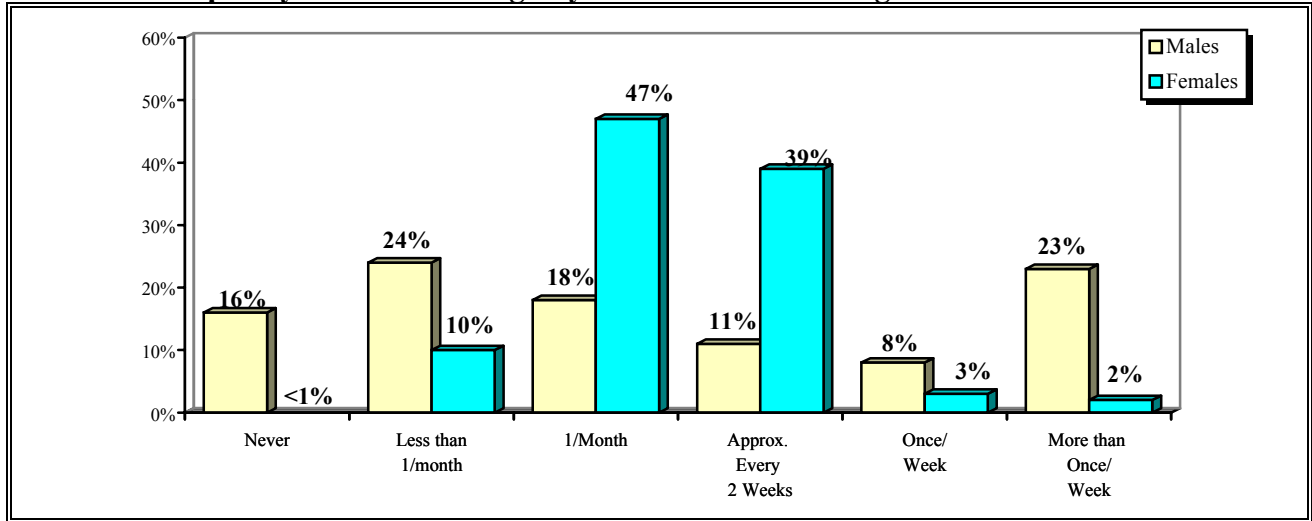
Undoubtedly, the availability of video lottery terminals at locations frequented most often by young adults has had a significant impact on the likelihood of trial and adoption of regular VL play within this age group. Continued adoption of regular VL play tends to be similar across all other age segments, except for the youngest and oldest adults in the province.

It could be argued that **both these population segments may be more likely to adopt regular VL play because they tend to have more leisure time and, on average, less family or related social obligations, responsibilities and expenses.** This is true, to some extent, as both these groups are less likely to have children living in their households and are more inclined to be single than any other segment. In terms of employment, 19 to 24 year olds are equally likely to be employed whether or not they play VL games regularly. However, half (50%) of Regular Players who are 50 years or older have full-time (40%) or part-time jobs (10%), as compared to less than one-third (30%) of adults in this age group who do not play. These older Non-Players are, instead, more likely to be retired (47% versus 36%). It may be that the younger players have not yet incurred the debts and responsibilities associated with mid-range age groups (e.g., mortgage, family), while older players have “*out grown*” them (e.g., house paid off, children grown, widowed/divorced). Thus, both groups may have more disposable income and the free time to play the machines.

Adults Aged 19-24 Years:

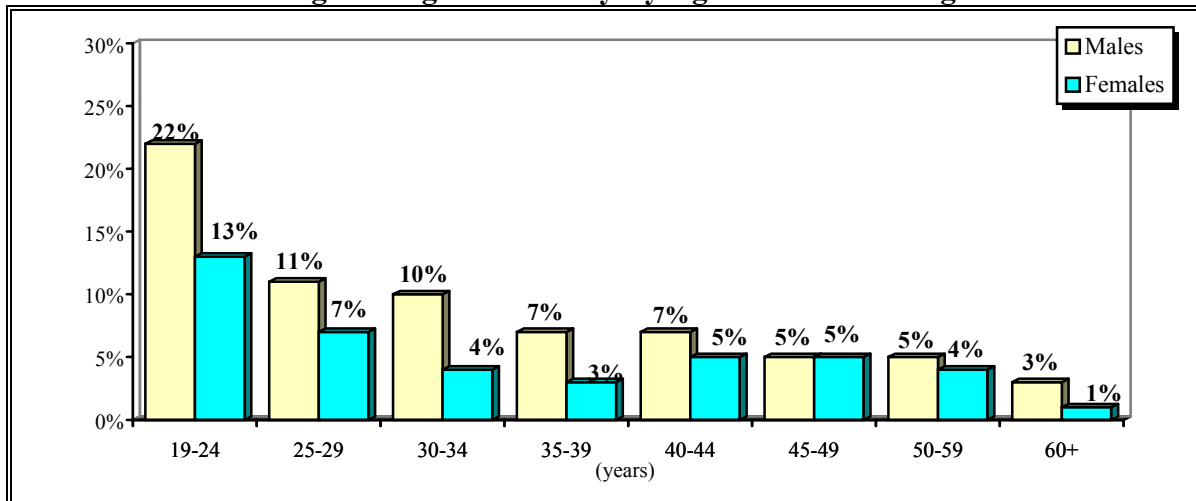
For those adults under 25 years of age, frequency of being in locations which have video lottery machines tends to be one of the primary factors influencing play. In particular, **women in this youngest age segment** are more likely to be going to bar locations at least once a month (90%) than any other segment in the population including their male counterparts (60%).

Frequency of Bar Patronage By Gender For Those Aged 19 - 24 Years



While young women have a greater tendency to be regular monthly bar patrons, those young males who *do* go are doing so significantly more often each month, with 31% of males who are 19 to 24 years old frequenting a bar location at least once a week or more compared to only 5% of women in this age category. Consequently, young males are in a location with video lottery machines, on average, 8.8 times per month versus 5.2 times for young women. Considering Regular VL Players in this age group, even though they tend to spend the same amount each time they play (\approx \$28.75), the fact that young men are in bars more often contributes to more frequent playing patterns and, consequently, higher monthly expenditures on VL gaming, as compared to young women (males 19 - 24: \$218.22 per month versus females 19 - 24: \$163.14 per month).

Percentage of Regular VL Play By Age & Gender Categories

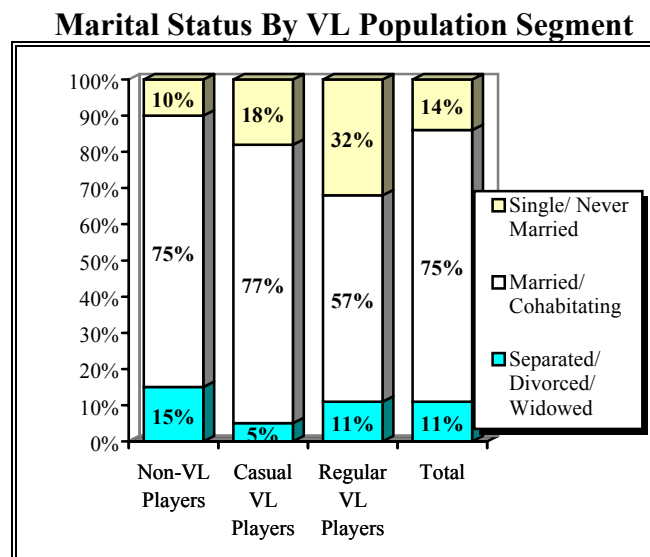


As may be expected, regular VL play by women aged 19 to 24 years is significantly higher than for women in any other age category (13% versus 1% - 7%). In fact, play levels for these young women actually equals, or exceeds, those noted for men aged 25 years and

older. However, young men are almost twice as likely to be Regular Players, with 22% of all males aged 19 to 24 years in Nova Scotia currently playing video lottery games on a regular basis.

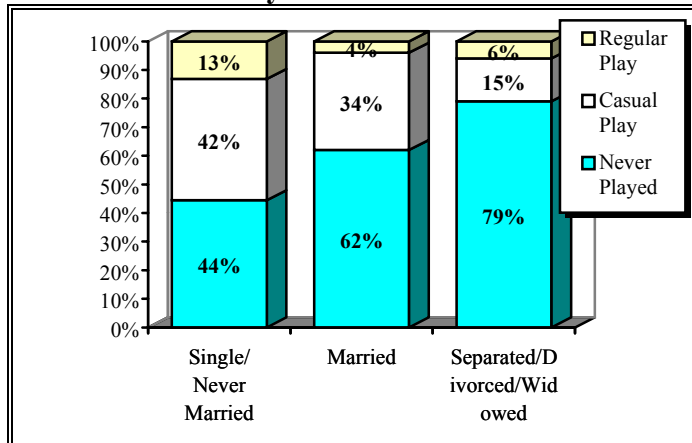
As young adults in the province continue to be exposed to this type of gambling, it will be important to determine if early adoption rates translate into long-term playing patterns. Video lottery gaming was first introduced by the provincial government in May, 1991. Those who were 19 to 24 years of age at the time the games were launched are now approximately 27 to 32 years of age. Not surprisingly, trial of video lottery games is significantly higher within these age categories (60% - 80%) than for those over 35 years (8% - 40%). However, regular playing patterns tend to drop off as young adults start establishing families/relationships and acquire more financial and professional responsibilities. It appears that video lottery play is more of a social activity for these youngest adults which is replaced, as their maturing/developing interests reduce their exposure to the machines. Increased experience with video lottery gambling, both through personal play and play by the majority of their peer group, may in some cases provide additional knowledge and, thus, ultimately, contribute to greater control over play. It also positions the games as a social and interactive activity, as opposed to a solitary pursuit. However, there is also a possibility that, with increased exposure, some young men and women in Nova Scotia may be at greater risk for developing long-term problems with VL gambling. (See Section 3.0 for more detailed analysis - Regular VL Players and risk indicators.)

2.6.3 Marital Status



Single adults, who have never been married, comprise approximately 14% of the adult population in Nova Scotia, yet represent almost one-third (32%) of Regular VL Players in the province. **Casual Players** are also more inclined to be single than **Non-VL Players** (18% versus 10%), although not to the extent noted for regular play. While those who are married or living with a partner account for the majority in all player segments, **Regular VL Players** (57%) are significantly less likely to be married than either **Casual** (77%) or **Non-Players** (75%).

Penetration of VL Population Segment By Marital Status



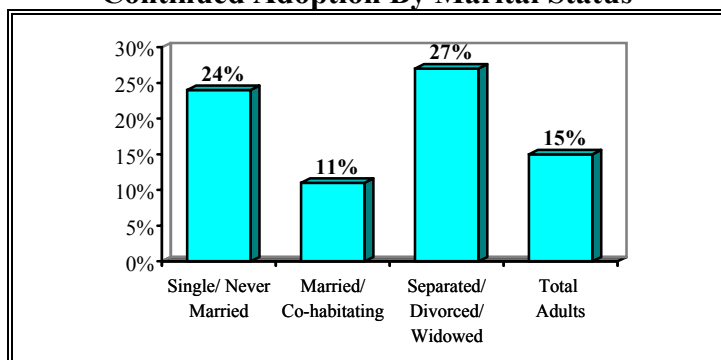
Overall, 56% of **single adults** are playing VL games on at least a casual basis, with 13% playing video lottery games regularly once a month or more. Conversely, only 38% of **married adults** have tried video lottery, with only 4% playing the games on a regular basis.

It is noteworthy that Casual VL Players are significantly less likely than those in the other two segments to be separated/divorced or widowed (5%). Casual Players account for approximately one-third of the adult population and, yet,

only represent 15% of those who are currently living without their spouse or partner. It may be that some of the Casual Players have remarried or acquired new partners at some time. **Regardless, 94% of Casual Players who have ever been married are currently involved in an on-going relationship with a "significant other," as compared to only 83% of Non-VL Players and 84% of Regular VL Players.**

Although the incidence of those who are separated/divorced/widowed is higher for both Non-VL Players and Regular VL Players, Non-Players are significantly more likely to fall into this category than are Regular Players (15% versus 11%). This is largely due to the fact that Non-VL Players, on average, are older (it will be recalled that 45% are over age 50) and, consequently, could be expected to have a higher rate of those who have lost a spouse or partner (i.e., widowed). This tends to be supported by the finding that 81% of those Non-VL Players who are separated/divorced/widowed are over 50 years of age (although it should be considered that separated/divorced may also be higher for this group as well, simply by virtue of having had more life experiences. In the future, research on VL gaming should further segment marital status to determine if there are significant differences between those who are separated/divorced and those who are widowed). **It has been speculated that regular VL play is often associated with higher divorce rates, family break-ups and separation. While this may be true for extreme cases, in general, the incidence of regular VL play is not significantly higher for adults in this segment (6%).**

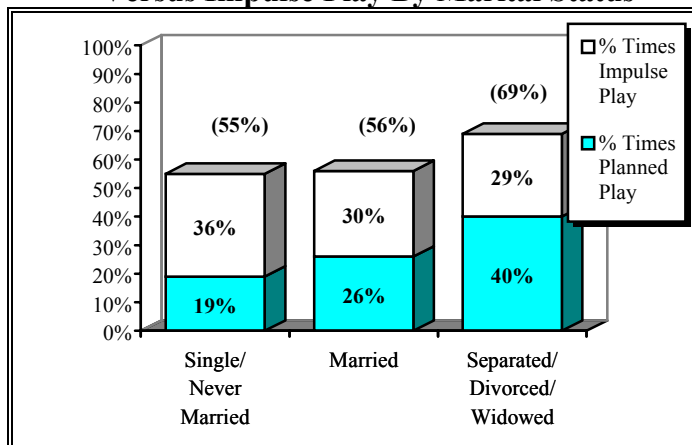
Continued Adoption By Marital Status



Once they have tried video lottery games, adults who are not currently living with a spouse or partner (27%), or are single (24%), are over twice as likely to adopt regular play of video lottery than those who are married (11%). The key differentiating feature appears to be related, again, to opportunity to play. Single adults, in

general, are more than twice as likely as married adults to have been in a location which has video lottery machines in the past month (6.7 versus 3.0). One would expect the same to be true for those adults who are separated/divorced/widowed, but they, as a group, only tend to be in a VL location 2.1 times per month. This suggests that Regular VL Players who are separated/divorced/widowed may be very different from other non-playing adults in this same segment. In fact, Regular VL Players who are separated/divorced/widowed are in a location with VLT's, on average, 9.7 times per month, as compared to only 2.3 times for Casual Players and 1.5 times for Non-VL Players falling in this marital segment. While those who are separated/divorced/widowed are not more likely to be Regular VL Players, the minority (21%) of these adults who have tried the games are more inclined to adopt regular playing patterns. **This suggests that the absence of a partner or spouse, combined with high accessibility to play (in VLT locations frequently), contributes to higher play levels for Regular Players who are separated/divorced or widowed.**

Percentage of Times Regular Players Are In A Location To Specifically Play VLT's Versus Impulse Play By Marital Status



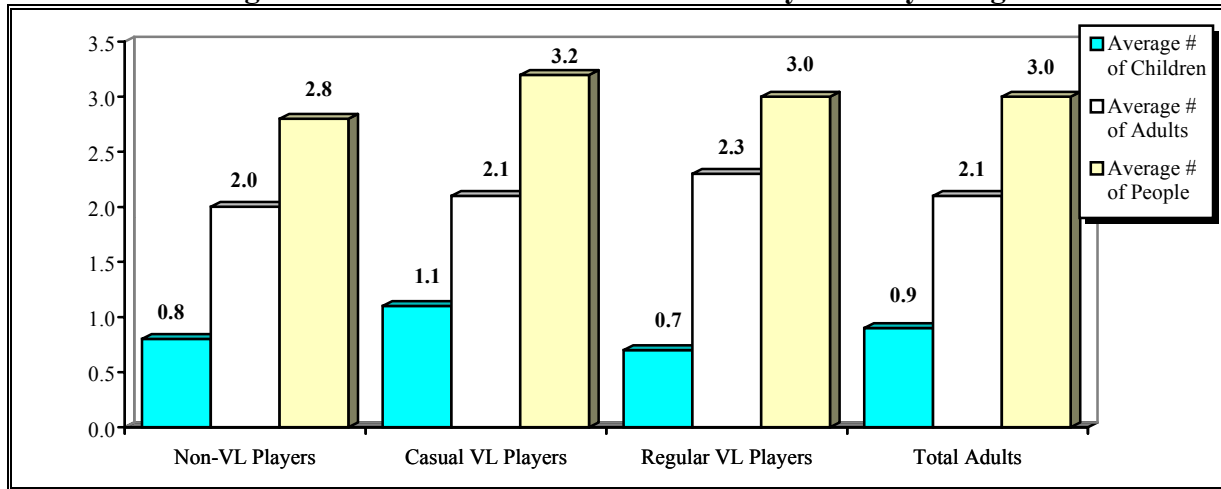
Supporting this conclusion, of all the times they are in a location which has the machines, those Regular Players who are separated/divorced/ widowed are significantly more likely to be there specifically to play the games (40%). In fact, 69% of the time they are in locations which have the machines, they end up playing versus only 55% to 56% for other adults.

This means that, although Nova Scotians who are not currently living with a partner are not more likely to be Regular VL Players, in

general, when they do try VL games, they tend to adopt regular play, and may be more susceptible to problem playing habits. What is not clear, however, is if video lottery played a role in their marriage break-up, or if the loss of a spouse through separation/divorce or being widowed actually led or contributed to play for this group.

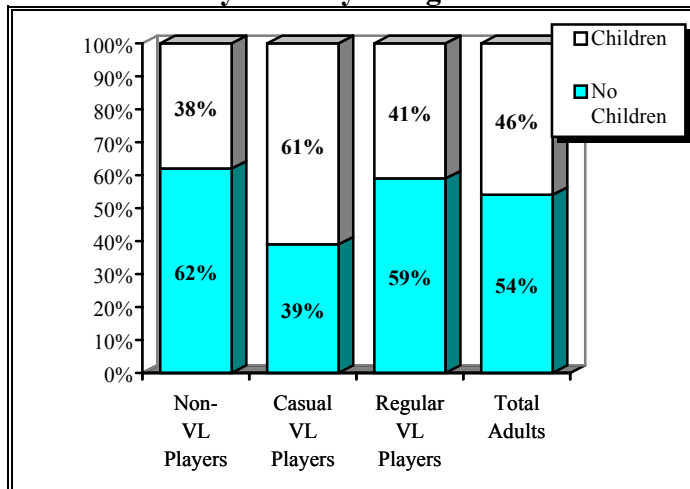
2.6.4 Household Composition

Average Number of Persons Per Household By VL Player Segment



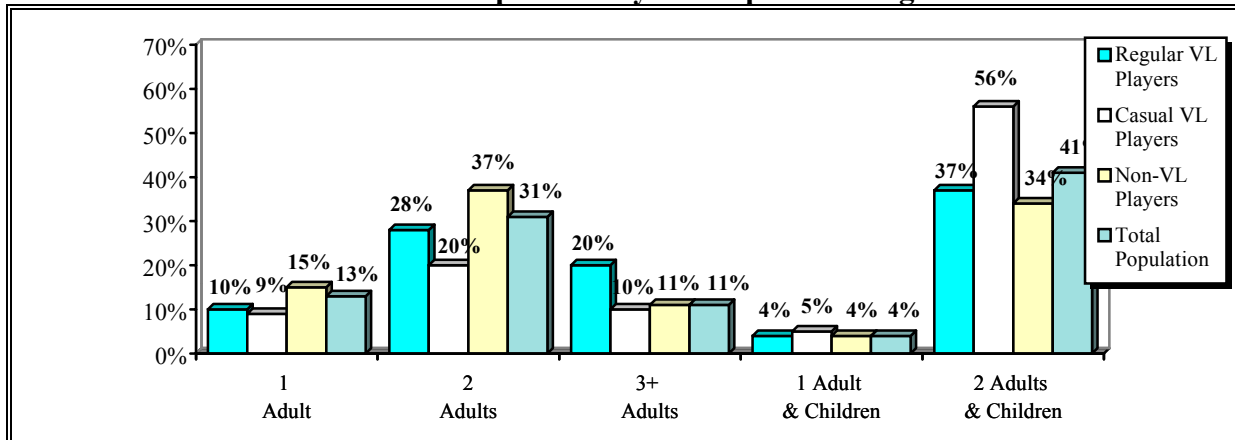
On average, Regular VL Players tend to have significantly more adults living in their households (2.3), as compared to either Casual (2.1) or Non-VL Players (2.0). However, Casual Players are more inclined to have children living at home (1.1 children versus 0.7 - 0.8).

Those Adults With Children In The Household By VL Player Segment



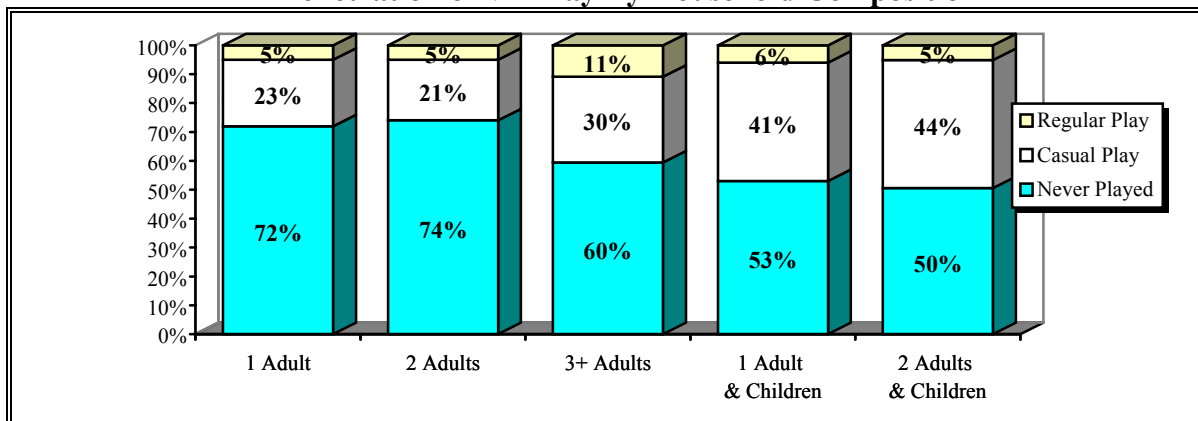
Overall, adults in Nova Scotia are fairly evenly split between living in households with (46%) or without children (54%), and yet 61% of Casual Players have children in their homes versus only 41% for Regular VL and 38% for Non-VL Players.

Household Composition By VL Population Segment



Not surprisingly, Casual VL Players are more inclined to live in family households with two adults and children (56%). Compared to Casual Players, Regular VL Players are more likely to live in multi-adult households (2+ adults) without children (48% versus 30%). Although 10% of Regular VL Players live alone, this is similar to results for Casual Players (9%). It is Non-VL Players who are more likely to live in single person households (15%). However, unlike Regular VL Players, Non-Players are more inclined to live alone or with one other adult (52% versus 38%). These findings tend to counter the belief that Regular VL Players are typically “loners” who live by themselves and, thus, are isolated from others.

Penetration of VL Play By Household Composition



In terms of penetration, it appears that play of video lottery games is significantly higher in households with children. However, this is almost entirely due to casual rather than regular play. Regular video lottery play is similar in all household segments, except for being higher for those with multiple adults (3+) and no children (11% versus ≈5%).

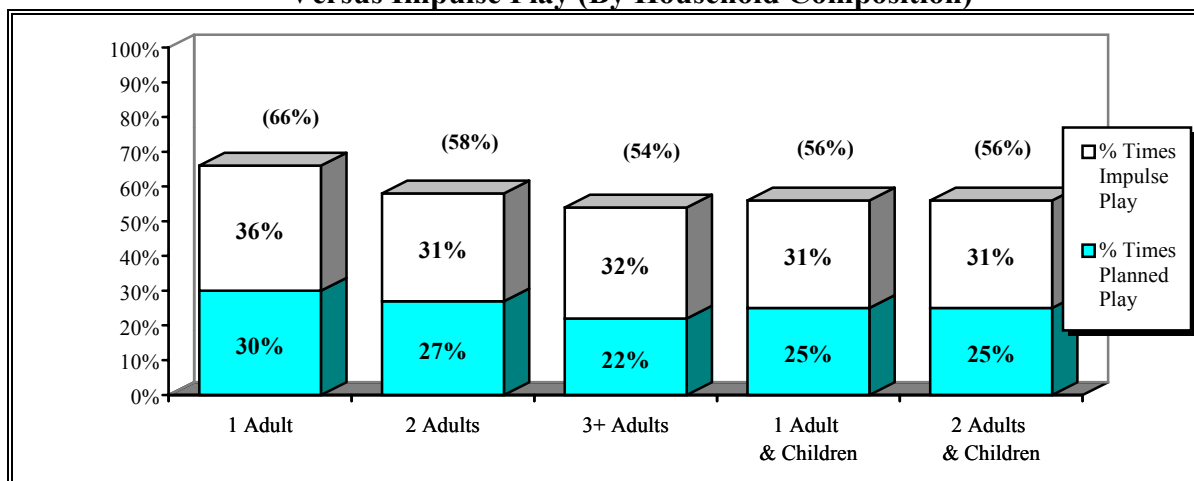
It should be noted, however, that the level of regular play in multi-adult households does not differ significantly from that observed for single parent households (11% versus 6%). (Given the lower incidence of adults living in single parent households (≈9% of households; ≈4.5% of adults), this segment had a smaller sample size (n=46) and, therefore, did not yield a significant

difference when compared to those in households with three adults or more (n=182). Due to a larger margin of error for estimates based on single parent households, the actual incidence of regular VL play within this segment may be within $\pm 6.9\%$.)

Adults who are single parents are no more likely than any other household segment to be involved in regular video lottery play. However, it may be expected that, given the typically reduced circumstances of single parents, regular play should be lower within this group. Approximately half of all single parents are divorced/separated/widowed and half are single/never married. The overwhelming majority are female (86%), with 81% under 35 years of age. Although results should be considered as exploratory (due to small sample sizes on a segment basis), it appears that those single parents who are divorced/separated are less likely to have tried VL gaming than those single parents who have never been married (27% versus 73%).

On average, single parents tend to be in locations which have video lottery machines more often than other adults (5.0 times/month versus 3.4 times/month). This is most likely attributable to the fact that these adults are younger and, as noted for the analysis of marital status, are not currently involved with a spouse or partner and, thus, are more inclined to be in a social setting which has the machines. When frequency of being at a location with video lottery games is compared to other adults under 35 years, there is no difference between single parents and adults in general (5.0 versus 4.7). Thus, the skew of single parents towards younger, single females tends to be influencing the incidence of regular play levels for VL gaming noted within this group. **As a result, regular VL play for single parent adults is similar to levels noted in all other household segments, but may potentially be more problematic, as there are obviously fewer individuals contributing to the household income. Furthermore, income is typically lower in this segment, with 67% of all single parent adults reporting household incomes of \$25,000 a year or less.** There are significantly more low income single-parent adults even when compared to those adults living in single person, one-income households (67% versus 53%).

Percentage Of Times In A VLT Location To Specifically Play VLT's Versus Impulse Play (By Household Composition)



The percentage of times Regular VL Players are in locations with VLT's in order to specifically play the games (planned play) is similar across all household segments (22% - 30%), as is impulse play (31% - 36%). However, **Regular Players who live alone are more inclined**

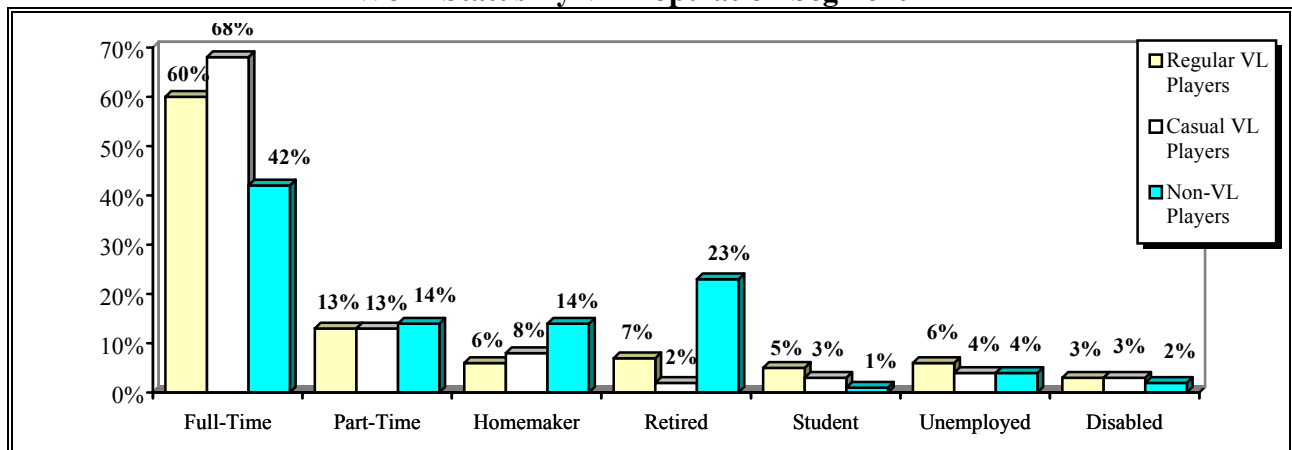
overall to end up playing whenever they are in a location which has VLT's (66% versus ≈56%).

Since these Regular VL Players are in locations, on average, slightly more often than players living with other people (13.1 versus 10.8 times, on average), they tend to play the games more often each month (8.6 versus 6.0 times). Furthermore, they play for longer periods of time each time they play (78.5 versus 68.2 minutes). As a result, Regular Players living in single person households comprise only 10% of all regular players, but will represent approximately 15% of those sitting in front of a video lottery terminals, in a given month.

The evidence suggests that those Regular Players who live on their own, on average, allocate more of their entertainment dollars (42% versus 35%) to VLT gambling, as compared to those who live with other adults. Thus, while adults living in single person households are no more likely than other adults to adopt regular play, it appears that once they do they are inclined to play more frequently and for longer periods of time.

2.6.5 Work Status

Work Status By VL Population Segment



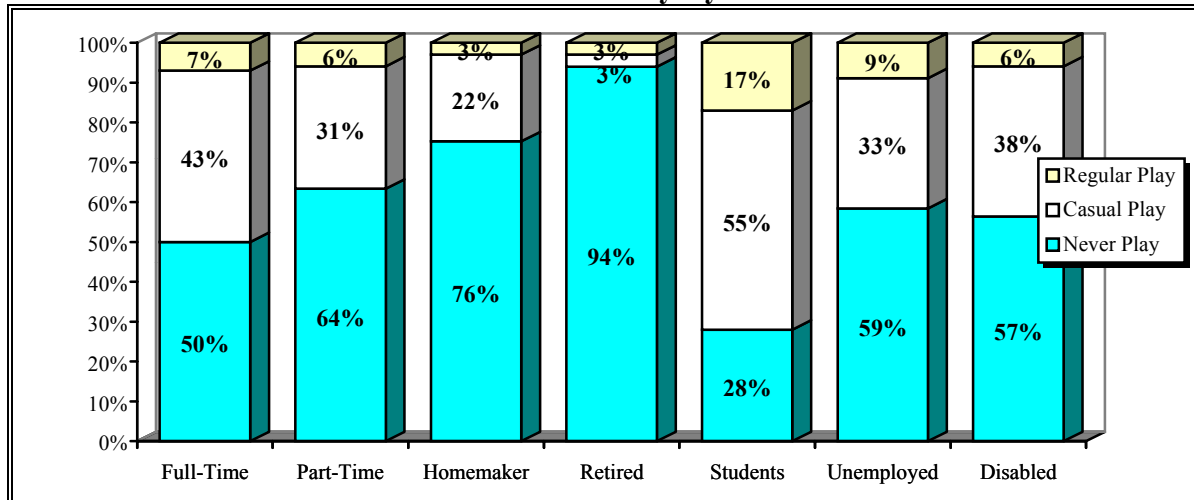
Contrary to many perceptions regarding video lottery play, both Casual (68%) and Regular VL Players (60%) are significantly more likely to be employed in full-time positions, as compared to those who have never played the games (42%). In particular, Casual VL Players are most inclined to work in full-time positions outside their homes.

Other notable differences for regular video lottery play are that students account for more Regular Players than Non-Players (5% versus 1%) and, as noted previously, Non-Players are more inclined to be retired (23%) than Regular VL Players. However, retired adults who have played VL games tend to make up a significantly larger proportion of Regular rather than Casual Players (7% versus 2%). This suggests that, **when they do play the games, retired adults tend to play on a more regular and frequent basis, presumably due to more leisure time and less professional or work related responsibilities.**

The incidence of those who stay at home on a full-time basis (homemakers) is also higher for Non-Regular Players (14% versus 6% - 8%). Homemakers are most likely to be female (98%) and tend to be older, on average, than women in other segments so it is not surprising these older females have not taken up play of video lottery.

There is no significant difference for the percentage of adults who are unemployed among the four segments.

Penetration of VL Play By Work Status



Overall, retired adults (6%) and homemakers (25%) are least likely to have tried video lottery games, yet in the case of homemakers, once they have played, they are just as likely as adults in any other work status segment to adopt regular playing patterns (13%). As noted previously, retired adults are significantly more inclined to adopt regular play after trial compared to most demographic segments (44%). It may be that this group is more susceptible to regular play than other segments, presumably due to having both the time and (possibly) resources to “invest” in video lottery. Unlike younger adults, they have less exposure to video lottery gambling. While this means they are less likely to play, it also means they have less experience with the machines, and this form of gambling. Strategies, such as those employed by casino operators in the province, which specifically target “seniors” by facilitating access and play, may be extremely effective in initiating regular gambling patterns in a relatively short time period. Given the lack of skill level required, the slot machines (which are similar to video lottery games) are attractive and easy to play. Without experience and/or the development of effective coping strategies for controlling play, it may be that seniors in Nova Scotia are particularly vulnerable to these continuous electronic forms of gaming. In the absence of understanding how the games work (random wins), adults may tend to apply strategies they have acquired or inferred from other games of chance which have a skill element, thus, leading them to think they can influence game outcomes when, in fact, they cannot.

As these forms of gambling become more accessible to older, retired adults (outside the traditional bar locations), it may be advantageous for the Department of Health to target this group with information services designed to educate them on electronic gambling.

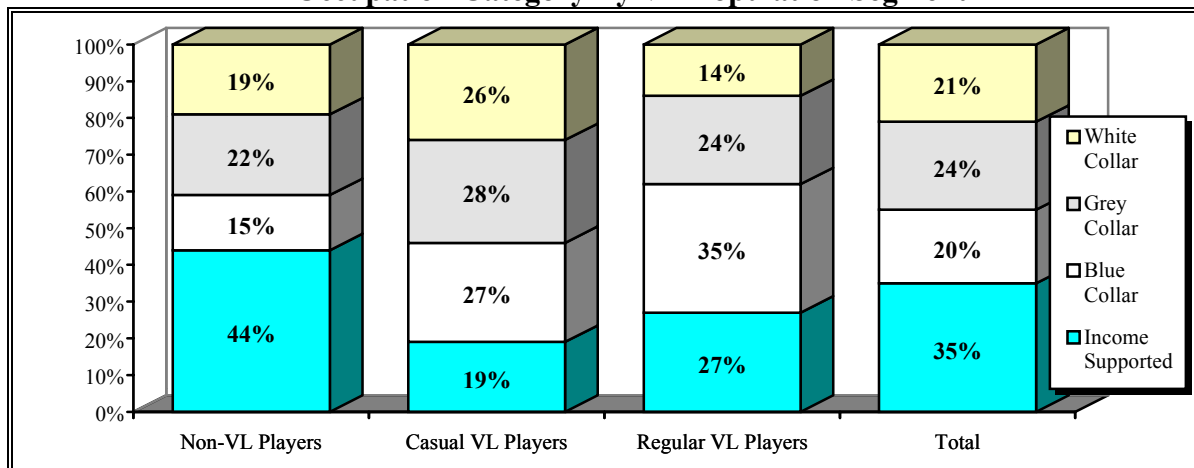
Trial of VL play by students is extremely high (72%), primarily due to the fact they are largely younger, single adults (58% under 30 years of age), frequenting VL locations an average of 7.3 times per month, with 58% in bars, clubs, pubs or lounges at least once a month or more. Despite high trial and, therefore, higher regular play levels, **continued adoption of regular play by students is similar to that noted in other segments, suggesting there is a social aspect to play within this group.** In fact, they only spend 25% of their entertainment dollars on VL play compared to 36% for all other adults.

Interestingly, there are no significant differences in play noted for those who are unemployed. Not only does this group comprise similar proportions of Regular, Casual and Non-VL Players, adults who are employed full-time or part-time are just as likely to be trial and Regular VL Players as those who are not currently working.

It may be surprising that Regular Players who are unemployed, on average, tend to spend just as much on VL play each month as those who are employed (\$259.28 versus \$266.78). Furthermore, expenditure on entertainment activities are similar within each group, with VL play accounting for approximately 37% of their total entertainment dollars. However, incomes within the unemployed players' segment are skewed significantly lower, with 44% having household incomes of \$25,000 or less compared to only 14% of those who are employed. This does not necessarily mean unemployed adults are more likely to be Problem Players (in fact, in Section 3.0 it is found this group tends to have similar levels of problem play, as compared to the other segments). It does suggest, however, **that the unemployed who play VL games on a regular basis are allocating substantially more of their income to entertainment activities including VL play than adults in most other segments.**

2.6.6 Occupation Category

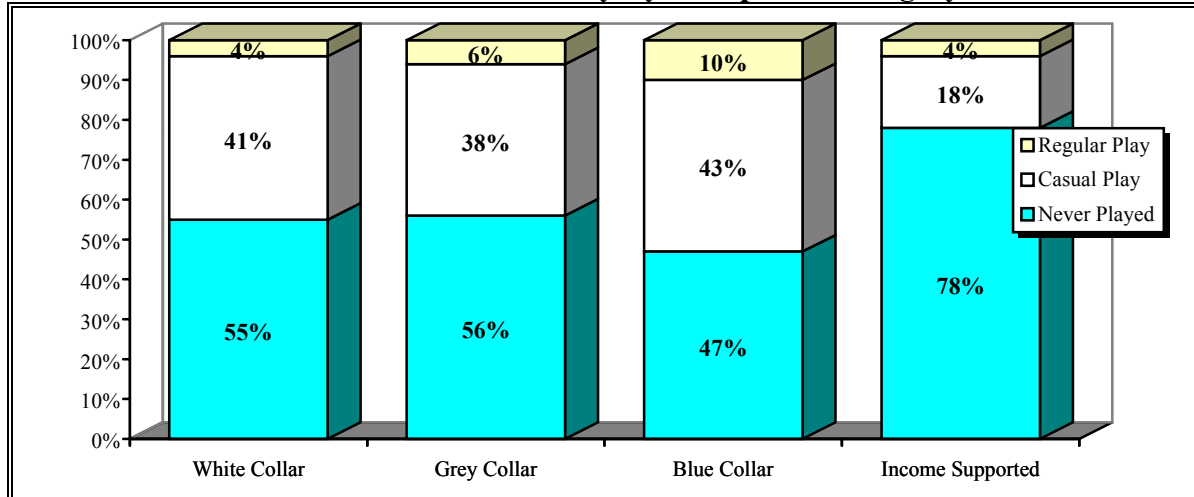
Occupation Category By VL Population Segment



Compared to both the other population segments, **Regular VL Players are more likely to be employed in blue collar occupations (35%) and least likely to be comprised of white collar workers (14%).** While Casual Players tend to have a higher incidence of those employed in blue collar occupations than Non-Players (27% versus 15%), the percentage of white collar workers in either group does not differ significantly (26% versus 19%).

The income supported occupation segment includes unemployed adults, homemakers, students, disabled and those who are retired. Consequently, it is not surprising to find a higher incidence of income supported adults in the Non-VL Players segment (44%). Casual VL Players tend to have the lowest percentage of income supported adults (19%).

Penetration of VL Play By Occupation Category



In terms of penetration of video lottery gambling among the occupation groups, there is no significant difference among the three employment categories (white, grey and blue collar workers) for casual video lottery play, while those in the income supported category are less than half as likely to have tried VL games. Essentially, **approximately 40% of all those employed play video lottery games on either a trial or casual basis, regardless of the type of work they do. However, blue collar workers are more likely to have ever tried VL gaming (53% versus ~45%) and to be Regular Players (10% versus 4% - 6%).** After trying the games, continued regular play tends to be significantly lower for those employed in white collar as opposed to blue collar occupations (9% versus 18%). In fact, adoption of regular VL gambling is highest for blue collar (18%) and income supported adults (19%).

Blue collar workers tend to be more inclined than **white collar workers** to adopt regular playing patterns and yet, adults in both segments tend to be in locations which have the machines on a similar basis (≈ 4.7 times per month). In fact, white collar workers are even more inclined to be regular monthly bar patrons than those employed in blue collar occupations (43% versus 31%).

Adults in both these occupations segments tend to be skewed towards males (63% versus 58%), with no notable differences in marital status (83% married) or in the likelihood of having children ($\approx 56\%$).

The primary difference appears to be related to socioeconomic status, with white collar workers skewed towards higher income levels (60% having annual household incomes over \$45,000 versus only 19% of blue collar workers) and significantly more white collar

workers having university educations (42% versus 2%) or any post secondary educations (56% versus 14%).

When only Regular Players are compared for the two segments, the average monthly expenditure level for VL gambling is almost twice as high for blue collar players (\$342.25 versus \$147.53). In fact, Regular VL Players employed in white collar occupations spend only 41% of their average monthly entertainment expenditure on VL gaming compared to 71% by blue collar workers. Both groups are just as likely to play VLT games a similar percentage of the time they are in locations which have the machines ($\approx 56\%$) and have the same incidence of planned ($\approx 20\%$) versus impulse play ($\approx 36\%$). However, blue collar workers who are Regular Players tend to play more often in an average month than those employed in white collar occupations (8.0 versus 6.1 times). Furthermore, each time they play, blue collar players, on average, spend more time (79 versus 50 minutes) and money (\$35.53 versus \$24.78) than white collar players.

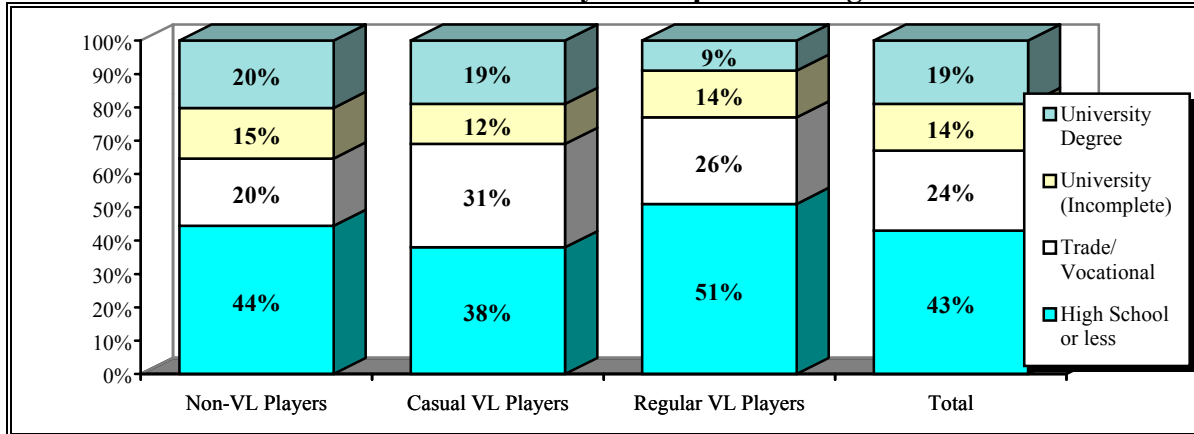
It appears that those Regular Players employed in blue collar occupations tend to rely on video lottery gaming for the majority of their entertainment, spending more time and more money on this type of gambling, as compared to adults in any other occupation segment.

2.6.7 Education

Respondents were asked for the highest level of education they completed. Based on preliminary analysis, responses were grouped into four principal education categories for profiling:

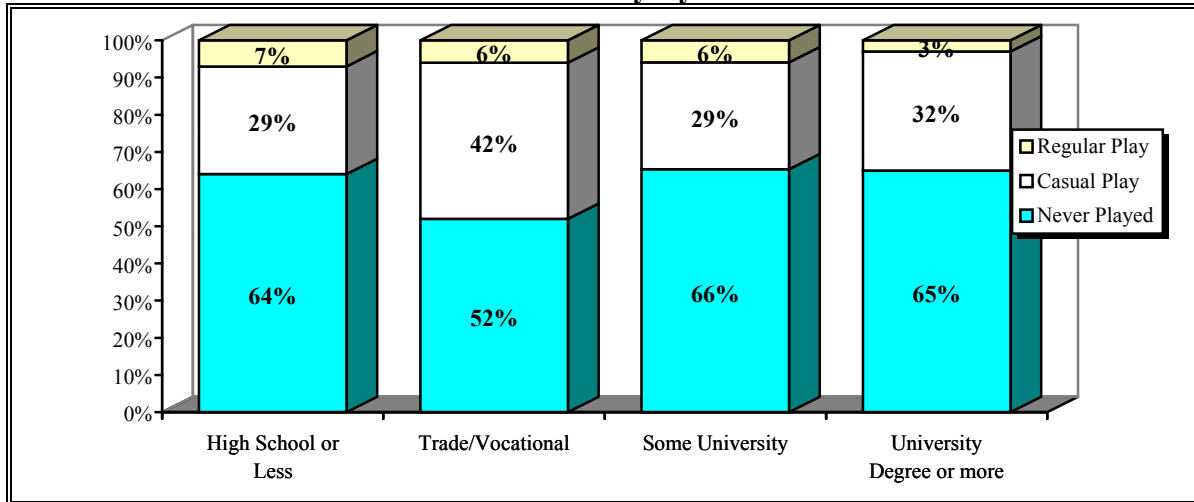
- ♦ high school or less (43% - including less than Grade 9 (9%) and high school Grades 9 - 13 (34%));
- ♦ trade school/vocational (24% - including non-university and community colleges);
- ♦ university without degree (14%);
- ♦ university degree/post graduate degrees (19%).

Education Level By VL Population Segment



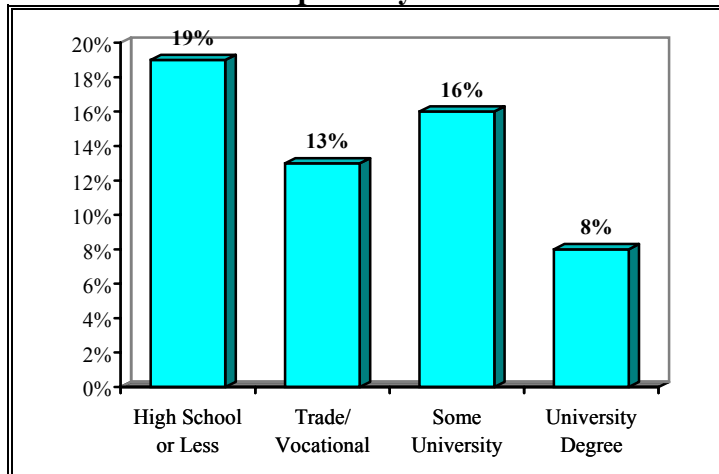
There appears to be a strong association between regular video lottery play and education levels. Compared to Casual and Non-Players, Regular VL Players are more inclined to have high school educations or less (51% versus 38% - 44%) and less likely to have university (8% versus ≈14%) or post graduate degrees (1% versus 6%).

Penetration of VL Play By Education Level



It is particularly compelling that, although trial of video lottery games is similar for adults with high school educations or less (36%) and those with university degrees (35%), regular play is twice as high for those with the lowest education levels, as compared to the most educated adults in Nova Scotia (7% versus 3%).

Continued Adoption By Education Level



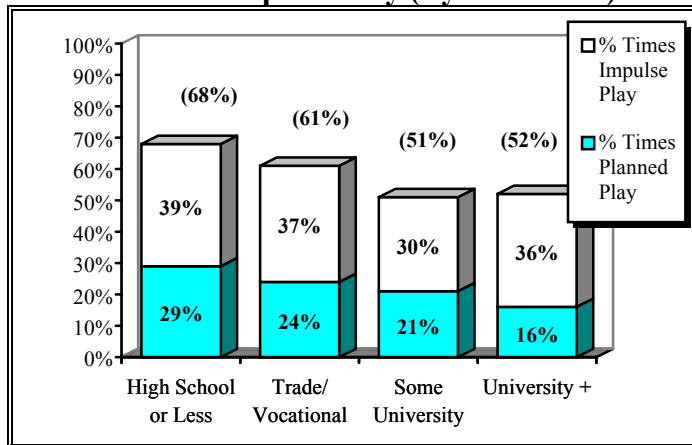
Overall, those with university degrees are least likely to adopt regular playing patterns after trying video lottery games. Although adults with trade school or vocational training are most inclined to play video lottery games, on even a casual basis, adults in this education segment are no more likely to become Regular Players than those with other education backgrounds (excluding university graduates).

Those currently enrolled in university are included among the “*some university*” segment. Therefore, it can be anticipated that, upon completion of their degree and a subsequent change in their lifestyle, regular play should decline for these adults. However, students only account for approximately 3% of adults in this segment and, thus, any change in their play behaviour will have minimal impact on results for this group. Presumably, “*new*” students will be entering this segment as the need for higher education increases. For the most part, those with partial or incomplete university educations fall across all age and work status segments, suggesting this group represents either those who have dropped out of university before completion or those who have supplemented their education through specific university courses. Therefore, these adults have different characteristics and play patterns than those who have completed a university education.

Not surprisingly, there is a significant correlation between education and income ($r=.50$ $p<.000$) at a total population level such that those with the highest education levels typically have higher annual household incomes. In fact, approximately 60% of university graduates and post graduates have household incomes above \$45,000 versus only approximately 17% for high school graduates and approximately 35% for trade school/vocational or some university.

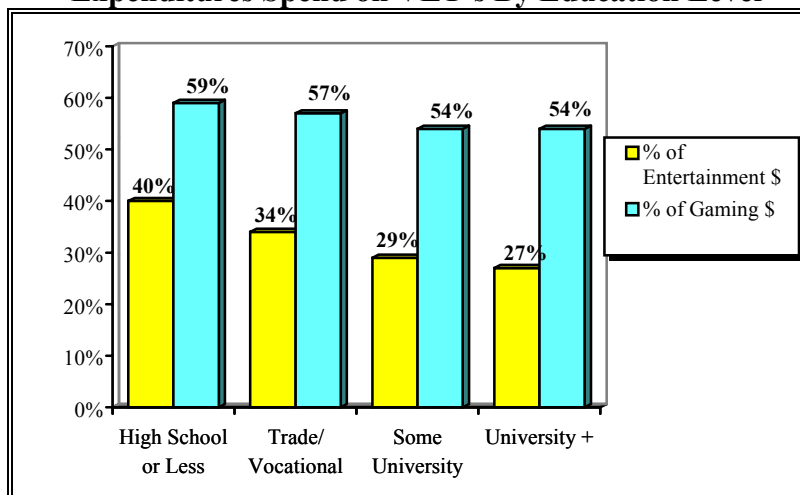
It is noteworthy that despite the skew towards lower incomes for those with lower education levels, average VLT monthly expenditure for Regular Players with high school or less is actually higher, on average, than for those Regular Players having university degrees (\$233.75 versus \$175.07). Thus, adults who have higher educations are not only less likely to play VL on a regular basis, when they do play, they tend to spend less.

Percentage of Times Regular Players Are In A Location To Specifically Play VLT's Versus Impulse Play (By Education)



Those Regular VL Players with university degrees are least inclined to be in a location with VLT's in order to specifically play the games, especially compared to adults with the lowest educations (16% versus 29%). Their play is more impulsive (36% versus 29%) and, yet, on average, they play less often when exposed to VL machines (52%) than those with vocational/trade school educations (61%) or high school or less (68%).

Percentage of Total Gaming & Total Entertainment Expenditures Spend on VLT's By Education Level



Regular VL Players in all four education categories allocate a similar proportion of their gaming dollars to video lottery gambling ($\approx 54\%$ - 59%). However, those with the lowest education levels spend 1.5 times more of their total entertainment dollars on VL, as compared to those with the highest educations (40% versus 27%). In fact, as education increases, the proportion of people's entertainment budget spent on

VLT's declines. This is not necessarily because more educated players have higher entertainment budgets (total entertainment expenditures do not differ among any of the segments, with the exception of those with trade school/vocational, on average, spending more (\$492.72 versus \approx \$415.00)). Rather, this is due to the fact that **Regular Players with higher education levels tend to spend less on gambling**, whereas those with **the lowest education levels allocate significantly more of their entertainment dollars to gambling activities** (65% versus 46%).

This is also true for adults in all three VL population segments, with those who have high school educations or less spending, on average, more than half (56%) of their total entertainment dollars on gambling activities (including VL) versus only one-third (32%) by adults with university level educations. (Adults with vocational/trade school (47%) and some university (43%) fall mid way between.)

Undoubtedly, those adults with higher educations are generally at lower risk for adopting regular play and, thus, potentially problematic VLT play. Given the relative youth of VL Players in Nova Scotia, and the relationship of play to education, strategies for informing and educating adults on gambling need to be directed at high school students (or younger), in order to achieve the greatest long-term value. Given the propensity for less educated adults to rely fairly heavily on gambling for entertainment, attempting to replace video lottery play with other entertainment activities for Problem Players in this segment may be more difficult. Strategies for controlling play rather than abstinence may be most critical for these adults, as it is highly likely they would continue to be exposed to gambling in various forms.

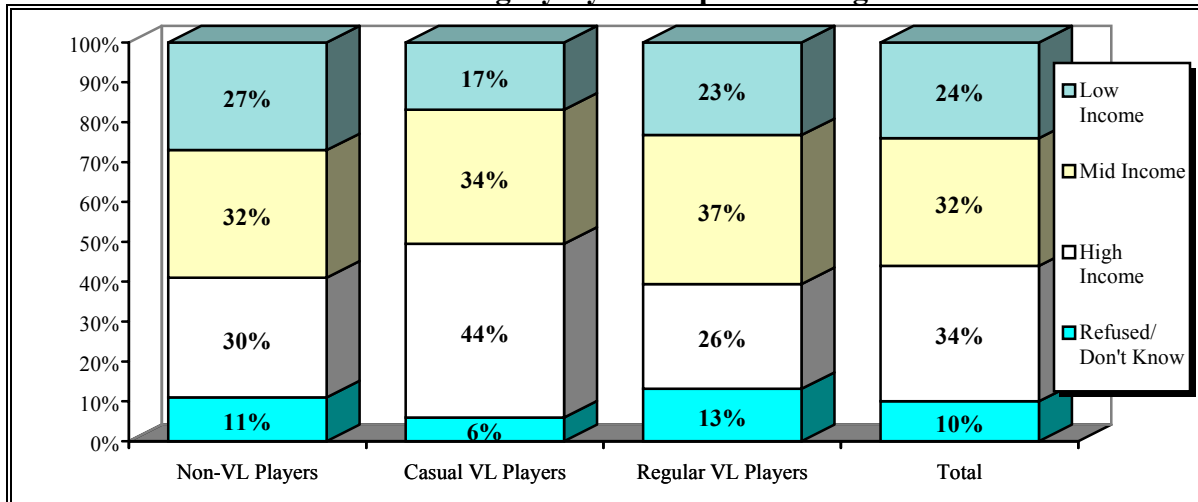
2.6.8 Annual Household Income

Preliminary analysis indicated that grouping household incomes into the following four segments provided a clearer picture of the relationship between VL play and income:

- **Low Income Households** (\$25,000 or less: 24%)
 - including <\$10,000 (4%) and \$10,000 - \$25,000 (20%);
- **Mid Income Households** (\$25,001 - \$45,000: 32%)
 - including \$25,001- \$35,000 (20%) and \$35,001 - \$45,000 (12%);
- **High Income Households** (\$45,000+: 34%)
 - including \$45,001- \$60,000 (15%), \$60,001 - \$75,000 (8%) and over \$75,000 (11%);
- **Don't Know/Refused** (10%)
 - including Refusals (8%) and Don't Know/Unsure (2%).

NOTE: *Rather than excluding refusals/don't knows from the income analysis, or attempting to derive income estimates based upon their responses for other demographic measures, it was decided to include these adults in a separate segment. The rationale for this is based upon assumptions that these responses may be related to VL play and, thus, additional insight can be gained by profiling this segment.*

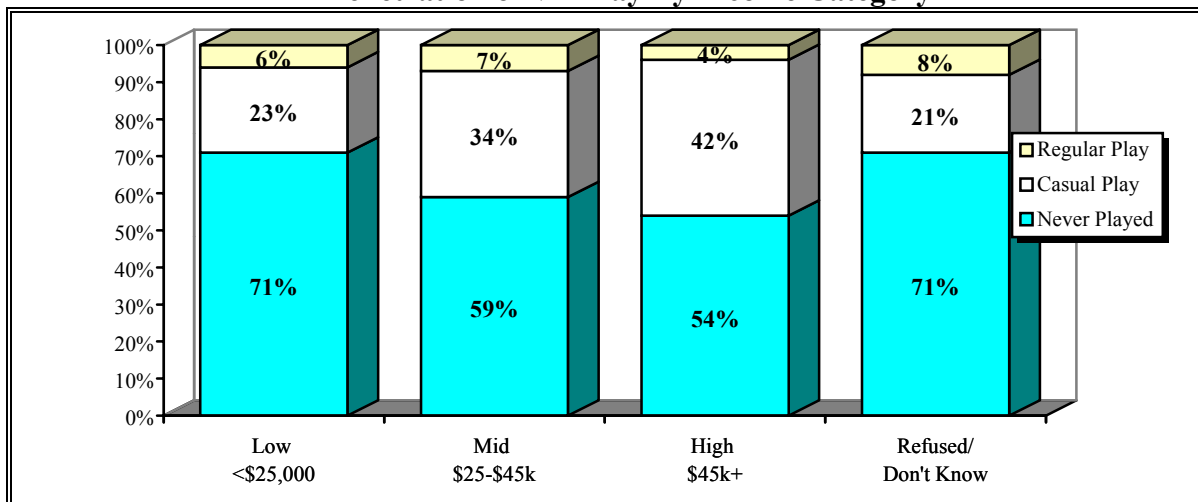
Income Category By VL Population Segment



In general, Non-VL Players tend to fall fairly evenly into the three primary income segments. Comparatively, Casual Players tend to be skewed towards higher household incomes, with significantly more adults earning over \$45,000 (44%). Regular Players are more inclined to have mid level incomes (37%), especially compared to Non-VL Players (32%).

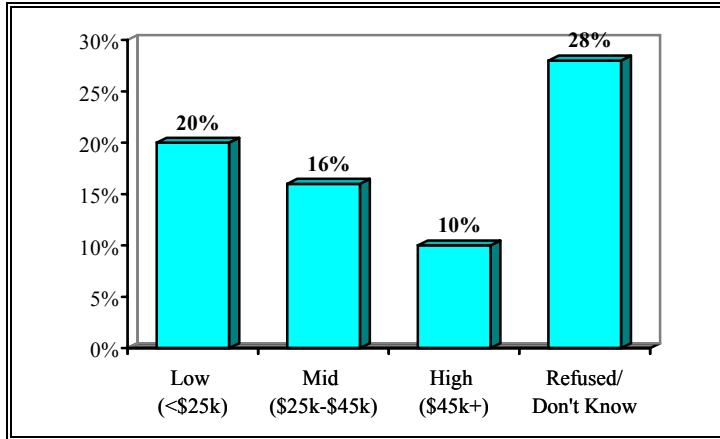
Just under one-quarter (24%) of adults in Nova Scotia have annual household incomes of \$25,000 or less. The incidence of lower income adults tends to be higher for those who have never played video lottery games (Non-VL Players: 27%) than for those who play the games on a casual basis (Casual Players: 17%).

Penetration of VL Play By Income Category



It has been speculated that video lottery gambling tends to target those adults who can “*least afford to play*”. In terms of regular video lottery play, adults with the lowest household incomes make up approximately 23% of Regular Players, which is almost identical to the proportion of low income adults found in the province as a whole.

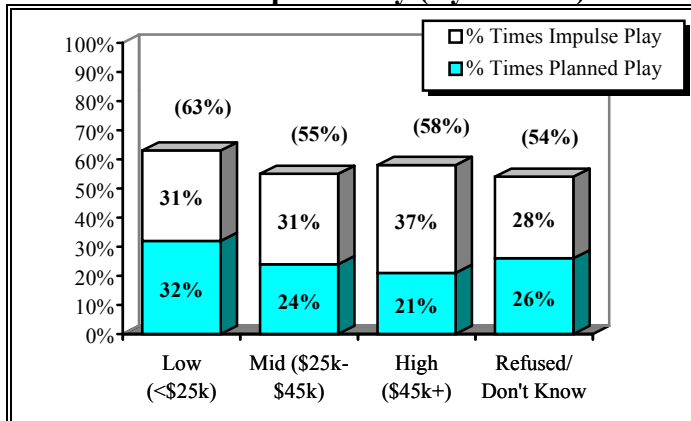
Continued Adoption By Income Segment



Within each of the household income segments, adults in the high (46%) and mid income brackets (41%) are significantly more inclined than low income adults (29%) to have ever tried VL gaming. However, higher income adults have a greater tendency to be Casual Players (42% versus 23% - 34%), and are least likely to play the games on a regular basis (4% versus 6% - 7%). As a result, adoption of regular play levels is significantly lower for those adults with the highest

household incomes (10%), as compared to both those with mid (16%) and low (20%) household incomes. It is noteworthy that although lower income adults are less likely to try the games, once they have played, they are among those most inclined to take up regular playing patterns. This suggests that, **while video lottery does not necessarily target low income adults more so than other income groups, the lower income segments are more likely to become Regular Players once they try them and, thus, may be more likely to need to learn how to manage their play of the games.**

Percentage of Times Regular Players Are In A Location To Specifically Play VLT's Versus Impulse Play (By Income)



When only those adults who play VL games regularly are considered, on average, lower income players are significantly more likely to be in a location which has the machines specifically to gamble on video lottery (32%), as compared to only approximately 24% for those with higher household incomes. Lower income adults tend to spend a similar portion of their gaming dollars on VLT's (60%). However, because gambling, in general, accounts for a larger portion of their entertainment budget (67%), **VLT expenditures by**

lower income VL Gamblers represent approximately 42% of their total entertainment dollars. Comparatively, those players in the mid and higher income levels, proportionately, only spend about one-third of their entertainment expenditure on VLT play.

The **refused/don't know income segment** comprises 10% of the adult population in Nova Scotia. Video lottery playing patterns for those who refused or are unsure of their annual household income tend to be similar to that noted for low income adults. Approximately 71% have never tried video lottery games. However, this group has the highest rate of continued adoption for video lottery gambling which means that 28% of all those who try the games

become Regular VL Players. The adoption rate of video lottery play by those who refused or don't know their household income is higher than that noted for adults with mid (16%) or high (10%) incomes, yet it only differs from low income adults (20%) at the 88% confidence level.

Overall, Non-VL Players were more inclined to refuse to provide their income (10% versus 4%), while Regular VL Players were more likely to be unsure in this regard (10% versus ≈1%). Casual VL Players are least likely to fall in either of these segments.

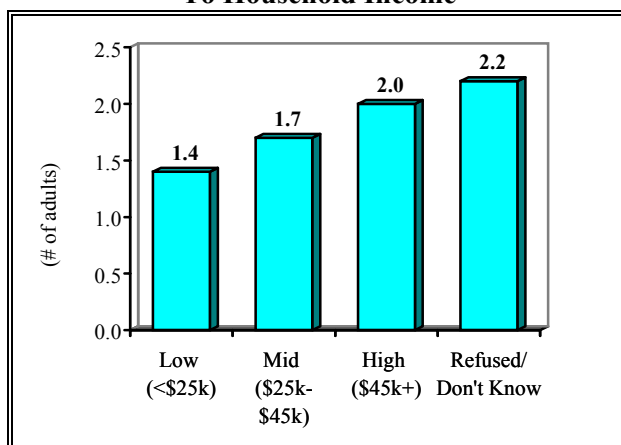
For those who are Regular Players, there appears to be a distinct difference between those who are unsure versus those who refused income.

Regular Players who do not know the total amount of their household income comprise 10% of Regular VL Players and, on average, tend to be younger than other adults (27.6 years versus 39.5 years); 60% are employed, although 40% of those working have part-time positions; 16% are currently students; and 73% are single/never married. On average, they have more adults living in their households (3.3 versus 2.2). **Therefore, the evidence suggests that the majority of these younger adults, who are unsure of their household incomes are most likely still living at home. It can be assumed that a larger proportion of their personal income is available for entertainment purposes than would be the case if they were the principal household "bread winner."** They are also among those adults who are most likely to be in bar locations or exposed to video lottery machines, in general, on a regular basis. Thus, it is not surprising that continued adoption of video lottery gambling is high in this segment.

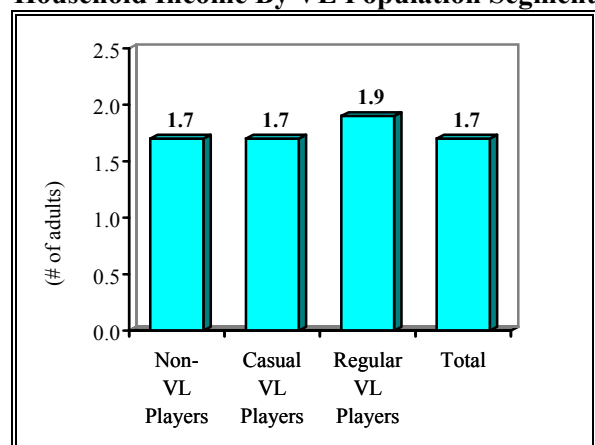
Those adults who have refused to provide their income make up a small proportion of Regular VL Players (4%). Although the results should be considered exploratory (due to small sample size: n=26), it appears **the Regular Players who refused to divulge their income may, in some cases, be reluctant to provide the information because of their level of VL play.** On a preliminary basis, there is a higher incidence of problem play in this segment compared to some other income segments (28% versus 8% - 11% - see Section 3.0).

Number of Adults Contributing to Income

Average Number of Adults Contributing To Household Income



Average Number of Adults Contributing To Household Income By VL Population Segment



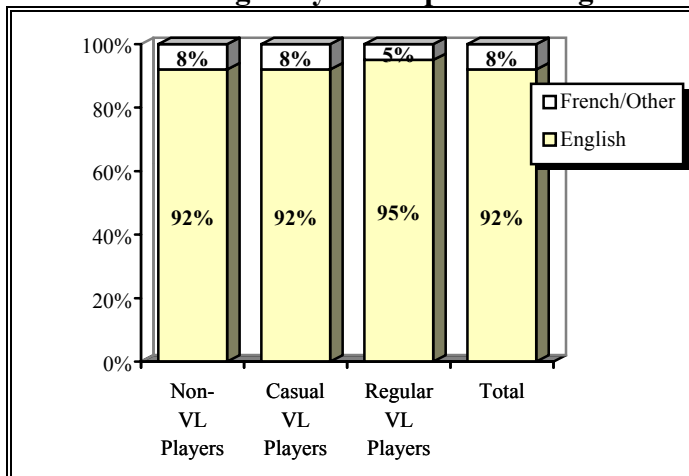
Not surprisingly, as the number of adults contributing to a household income increases so does the total amount of the collective household income. While this tends to be a logical association, it is noteworthy that, on average, Regular VL Players tend to have significantly more adults contributing to household incomes, as compared to the other two population segments (1.9 versus 1.7). Yet, income levels within the Regular VL Player segment tend to be skewed significantly lower than for Casual Players and similar to that noted for Non-VL Players.

Since, on average, there are more employed adults living in households with Regular VL Players, this suggests that the average income per adult tends to be lower for those households with at least one Regular VL Player. This is partially due to the fact Regular VL Players tend to be younger, are less likely to have university degrees or to be employed in professional occupations.

NOTE: *Survey respondents were asked to indicate which of the broad income categories best described their total annual household income (everyone combined before taxes). Ideally, it would be preferable to obtain actual income amounts, however, this approach tends to yield higher refusal rates and, therefore, less usable information upon which to base analysis. It is possible to derive accurate estimates of income from this ordinal data based upon the distribution of income responses and assignment of estimated values. These values can then be used to calculate average household income levels and average per adult/per household member (including children) income estimates. Based on these estimates obtained, it is possible to determine the relative impact of video lottery and other gambling expenditure, as a proportion of an individual's resources (income). This is additional analysis which the Department of Health may wish to undertake.*

2.6.9 Mother Tongue

Mother Tongue By VL Population Segment

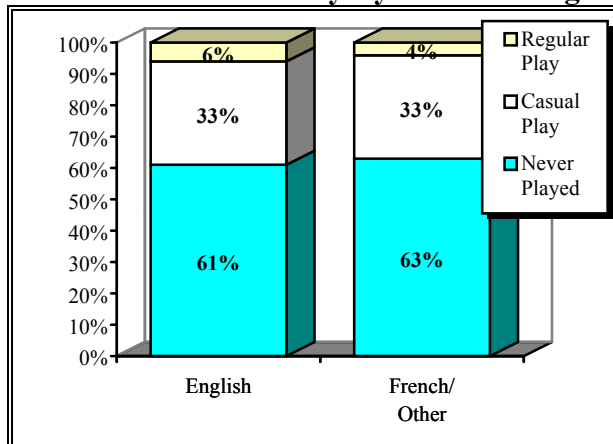
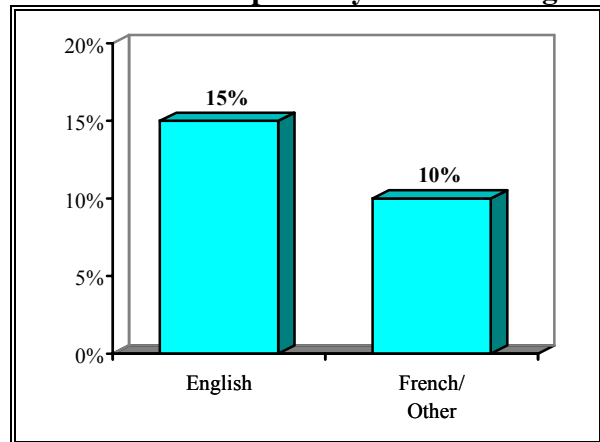


Based on the results of the study, it can be estimated that approximately 92% of adults in Nova Scotia are Anglophones, who speak English exclusively as their first language. There will be some bias in these estimates, as any adults who could not speak either English or French would have been excluded from participation in the study. (This bias will be minimal, as the majority of all adults speak one or both of Canada's official languages.) Due to small sample sizes for mother tongue (excluding English), it was necessary to combine all other

languages for comparison purposes. However, it was found at a total provincial level that, overall, Francophones represent 3.6% of the population and those with other mother tongues comprise approximately 2.4% which is highly similar to Statistics Canada estimates for the

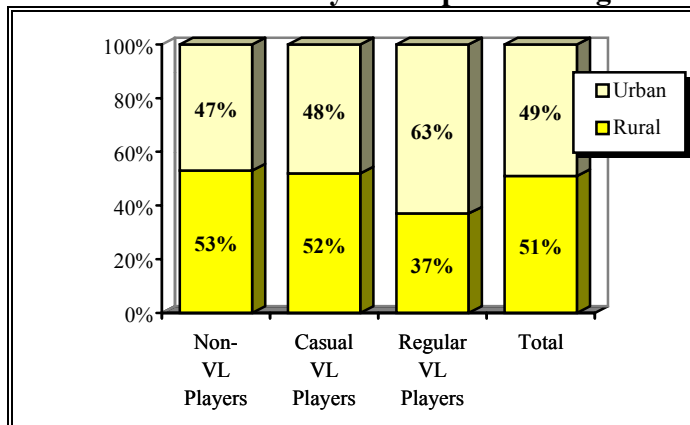
province (French: 2.2%; Other: 3.0%). An additional 1.6% cited both English and French as their mother tongue and these bilingual adults were included in the French/Other category as well.

In general, there are few differences in terms of language, with Regular VL Players more likely to be comprised of English speaking adults than the Non-VL Players segments (95% versus 92%). Again, this is largely due to the skew towards younger adults for Regular VL Players. Adults under 35 years of age are significantly more likely to have English as their mother tongue than those over 35 years of age (96% versus 90%).

Penetration of VL Play By Mother Tongue

Continued Adoption By Mother Tongue


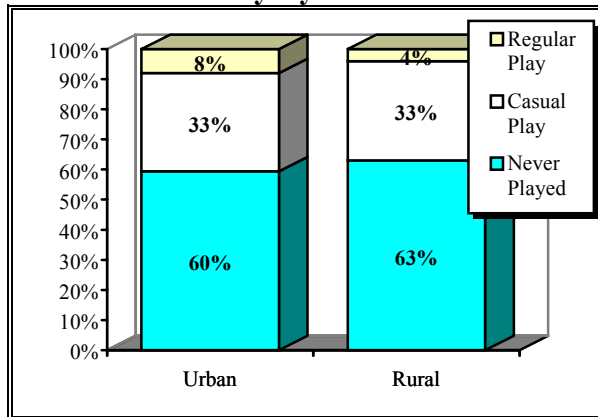
Trial and regular play (6% versus 4%) of video lottery games is almost identical for both Anglophones in Nova Scotia and those who have other mother tongues. Continued adoption of video lottery gambling (i.e., those who play on a regular basis after trial) appears to be higher for English speaking adults (15% versus 10%). However, due to the smaller sample size for those with other mother tongues (n=63), this does not represent a significant difference in play behaviour.

2.6.10 Area of Residence

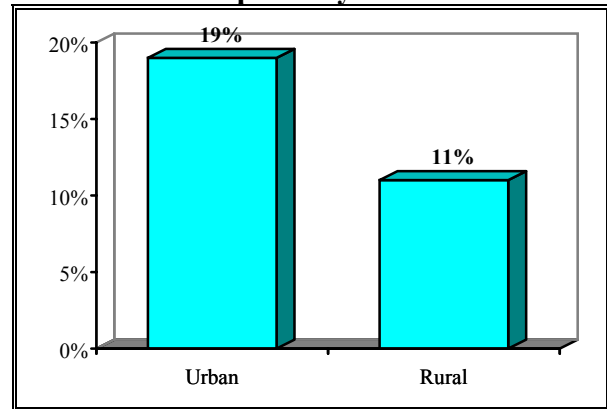
Area of Residence By VL Population Segment


The proportion of adults in Nova Scotia is evenly split between living in urban (49%) and rural areas (51%) of the province. Not surprisingly, **Regular VL Players are significantly more likely to live in urban centres (63%)**, with no skews in area of residence noted for Non-VL Players or Casual VL Players.

Penetration of Play By Area of Residence



Continued Adoption By Area of Residence



There is no significant difference in the percentage of adults in either segment who play the games on a casual basis (33%), **however, urban residents are twice as likely to be involved in regular monthly play than rural residents (8% versus 4%). As a result, adoption of regular video lottery play in urban areas of Nova Scotia is substantially higher than in rural Nova Scotia (19% versus 11%).**

While part of this discrepancy is due to a higher concentration of locations which offer VL gambling (and presumably more VL machines), it is also attributable to a greater concentration of young adults in the province living in urban centres. In general, adults under 30 years of age comprise approximately 15% of the adult population, yet make up 19% of urban residents and only 10% of rural residents. Furthermore, young adults (<30 years) comprise 36% of Regular VL Players in urban centres versus only 14% of Regular VL Players in rural areas of Nova Scotia. As younger adults move to urban areas to pursue educational or employment opportunities, they also tend to be exposed to more social and entertainment options, particularly in the form of licensed drinking establishments. Not surprisingly, young adults in the city are more likely to be in bar locations on a regular monthly basis than their counterparts living in the county (68% versus 52%), and yet, a similar proportion of young adults in both areas play video lottery games on a regular basis (14% versus 10%). Also, regardless of where they live, a similar proportion of those young adults who try the games adopt regular playing patterns for video gambling. Thus, for young adults, living in the city itself does not necessarily lead to higher regular video lottery play.

The results suggest that, in addition to greater accessibility to the machines, demographic differences between the two populations contribute to the higher regular play levels in urban centres. In the case of younger adults especially, video lottery may be a more social gaming activity by those who live in the city than for many other player groups.

When only Regular Players are considered, rural players are more likely to be in locations with VLT's specifically to play the games (29% versus 23% of the time). Players in both areas are equally likely to play on impulse. As a result, the times they are in a location with the machines, players in the country will tend to play more often than their counterparts living in the city (61% versus 55%).

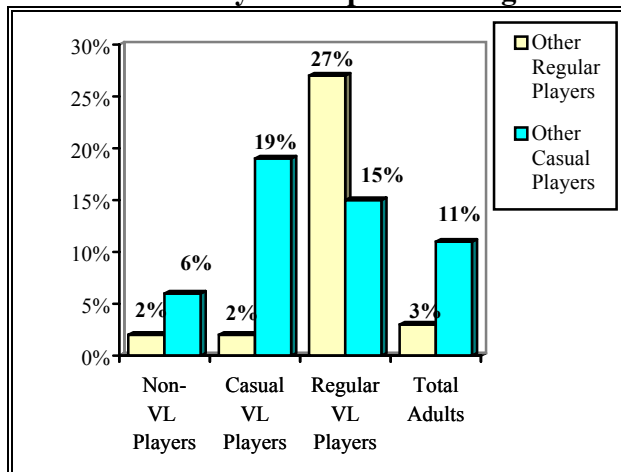
On average, Regular VL Players in both areas of Nova Scotia tend to play the machines 6.7 times per month, playing approximately one hour and five minutes each time. However, **urban players spend significantly more each month on VL play (\$287.50 versus \$168.17), suggesting they tend to wager higher amounts than rural players.**

Typically, Regular Players in urban areas of Nova Scotia spend more on entertainment activities each month (\$497.41 versus \$330.96). As a result, video lottery gambling, on average, accounts for a higher proportion of rural players' monthly entertainment budget, despite the lower amounts wagered and spent each time they play (60% versus 55%).

On average, adults living in urban areas of Nova Scotia tend to have higher incomes and higher education levels than those living in rural areas. These characteristics tend to be associated more often with casual, more social play of video lottery games. Therefore, despite the higher levels of regular play in urban Nova Scotia, adults in rural areas of the province may be at greater risk for developing problems with VL gambling, if the machines should become more accessible to them. In fact, the incidence of problem play is similar for Regular VL Players living in either rural (15%) or urban (18%) areas of the province (≈16% of Regular VL Players can be classified as Problem VL Gamblers - see Section 3.0). Since there are more Regular Players living in urban centres in Nova Scotia, per capita, there will be more Problem Players requiring support and/or treatment. However, 32% or approximately 12,500 Problem Players live in rural areas which will require different strategies in service/support provision.

2.6.11 Household VL Play

Incidence of VL Play For Other Household Members By VL Population Segment

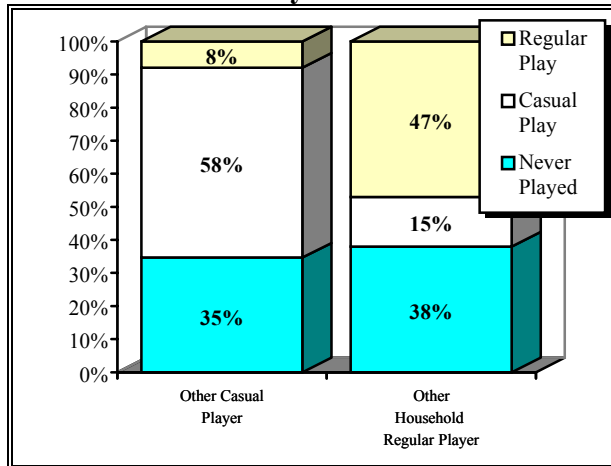


Overall, 11% of adults have at least one other household member whom they believe plays video lottery games on a casual basis (less than once per month, on average), with 3% reporting at least one other Regular VL Player living in their household.

Not surprisingly, the incidence of casual play for other household members tends to be higher for those adults who either play on a casual basis themselves (19%) or who are Regular Players (15%). Comparatively, only 6% of Non-VL Players report having a casual player in their household. Regular play by other household members tends to

be significantly higher for those who already are playing video lottery games on a regular basis (27% versus 2%).

Penetration of Play By Presence of Other Players In Household



The association between the VL play behaviour of an individual and other household members' involvement in the activity is even more clear when it is examined for those who have Casual or Regular Players in the household. Casual VL Players account for 58% of all those who have **other casual players** in their households, whereas Regular Players account for only 8%. Conversely, 47% of those who have other Regular Players in their households are also Regular Players themselves versus only 15% who are Casual Players.

Essentially, this means almost half of those adults living with a Regular Player are Regular Players themselves. This may have implications, not only for household financial resources, but also for controlling play, if one or both are having difficulties.

Based on household composition for Regular Players, it is possible to estimate the proportion of the population who are exposed directly or indirectly to regular video lottery play, either through personal play or due to regular play activity by other immediate household members.

👉 Population Estimates For Those Exposed To Regular VL Gambling In Nova Scotia

	<u>Total Population</u>	<u>Percentage of Total Population</u>
Total Nova Scotia Population [†]	≈909,280	100%
Total Adults (19+ years) [†]	≈679,505	74.4%
Total Children (<19 years) [†]	≈229,775	25.3%
Regular VL Gamblers	≈38,732	4.3%
Other Adults Living With Regular VL Gamblers	≈31,412	3.5%
Children Living With Regular VL Gamblers	≈21,350	2.3%
Total People in NS Living in Households With a Regular VL Gambler (including Regular VL Gamblers)	≈91,493	10.1%

Total Households With Regular VL Players:	≈30,498
% of Nova Scotia Households with 1+ Regular VL Players:	≈9.3%

[†] Source: Financial Post - Canadian Markets 1997 - 1998 Nova Scotia Population Estimates

In total, 5.7%, or approximately 38,700 adults, play video lottery games on a regular basis each month in Nova Scotia. Given the nature of video lottery play, there will be some fluctuations in this estimate as players move into and out of regular play habits. However, for the majority of these adults, play is well established and habitual. These regular players reside in approximately 30,500 households in Nova Scotia.

Based on the above calculations, it can be estimated that 10.1% of all Nova Scotians, or approximately 91,500 people are living in households with at least one Regular VL Player. This translates into 10.3% of all adults ($\approx 70,000$) and approximately 5% of all children ($\approx 21,500$) in the province.

2.6.12 Demographic Profile For Regular Video Lottery Play in Nova Scotia (Data Table)

Table 2.6 provides a comprehensive demographic profile for regular video lottery play in Nova Scotia. This table is included for reference purposes, primarily to allow the reader to determine the contribution of adults (and players) in the various demographic categories to monthly video lottery revenues in Nova Scotia. It should be noted that this table exclusively profiles Regular Video Lottery Players, defined as those who play VL games on a regular basis of once per month or more (5.7% of Nova Scotian adults) and does not include Casual VL Players (32.8% of adults). While Casual Players comprise a significantly larger proportion of the Nova Scotian population, these players only contribute approximately 3% of video lottery revenues in any given month.

There are seven analyses included in the Demographic Profile for Regular Video Lottery Play in Nova Scotia:

1. Percentage of the Nova Scotian adult population in each demographic category (**Percent of Population**)
2. Percentage of the video lottery player base accounted for by each demographic category (**Percent of Regular VL Players**)
3. Video Lottery Players in each demographic category as a percentage of Nova Scotian adults (**Percent of Adults**)
4. Percentage of those adults within each demographic category who are Regular Video Lottery Players (**Percent of Category Playing**)
5. Average video lottery expenditure in the last month per player in each demographic category (**Average Expenditure for Regular VL Players**)
6. Average video lottery expenditure in the last month per adult in each demographic category (**Average Expenditure for Adults**)
7. Percentage of total video lottery revenue generated by each demographic category (**Percent of VL Revenue**)

To assist the reader in interpreting the table, each of these measures is described below in greater detail:

1. Percent of Population:

This shows the size of each segment in the Nova Scotian adult population (19 years of age or older). For example, males comprise 48% of the adult population in the province. With a total sample size of 1,088, this means that males in this table represent a sample size of approximately 522 (due to the weighting of respondents based on the incidence of VL play, the actual number may vary slightly from this estimate).

2. Percent of Regular VL Players:

This statistic indicates the percentage of all Regular VL Players that come from each demographic segment. This provides a measure of the category's importance based on its contribution to the video lottery player base. For example, 62% of all Regular VL Players in Nova Scotia are men. This can be compared to the size of the segment in the population; in this case, it means that men comprise less than half of all adults in Nova Scotia (48%), but account for 62% of Regular VL Players in the province (suggesting either that men are more likely to play video lottery games regularly, or women are less likely to play regularly).

3. Percent of Adults:

This measure reports the video lottery players in the category as a percent of Nova Scotian adults. Although 62% of Regular VL Players are male, these players represent 3.6% of the total NS adult population.

4. Percent of Category Playing:

This measure represents *market penetration* or the percentage of those within each demographic category who are Regular VL Players. In the table, 7% of all men in Nova Scotia play video lottery games on a regular basis (once per month or more). Men, in general, are more inclined to be Regular VL Players than women, of which only 4% are Regular Players.

5. Average Expenditure for Regular VL Players:

This statistic shows the average amount spent (out-of-pocket) on video lottery games by each Regular VL Player in the demographic category. The amount is based on derived video lottery expenditures in the last month for each Regular Player (i.e., # of times played in the last month X amount spent each time) and does not include any winnings the player may have invested during play. Expenditures were capped at a maximum of \$2,000 per player before averages (means) were calculated. While this does reduce the average expenditure amounts, it also reduces the impact any outliers have on the mean and, thus, greatly enhances the ability of the analyst to more accurately identify patterns in play/spending based on demographics. For example, Regular VL Players who are men spent, on average, \$218.22 each on video lottery play in the last month (excluding winnings). This is a higher amount than noted for female Regular VL

Players (\$163.14 per month, on average) which suggests that men are not only more likely to be Regular Players (7% versus 4%; market penetration), male players also tend to spend more money on the games over the course of a month than female players.

6. Average Expenditure for Adults:

This measure presents the average amount spent on video lottery play (derived expenditures for the last month) calculated based on all adults in that demographic category, including those who are not Regular VL Players. Essentially, this number reflects the combined result of market penetration (Percent of Category Playing) and Average Expenditure Per Player to represent the best overall measure of average expenditure per adult in each demographic category. Either low penetration or low player expenditures can result in low average expenditure per adult. In the table, the average amount spent in the last month for all men in Nova Scotia is \$16.65. This is more than twice the amount spent by women in the province (\$7.24).

7. Percent of VL Revenue:

This column shows the estimated percentage of video lottery revenue (from Regular Video Lottery Players) generated by each demographic category in a given month. (It will be recalled that Casual Players are not included in this analysis. The average monthly expenditure on VL games per Casual Player is \$1.29; as such, these players generate approximately 3% of total VL revenues in a given month. Therefore, the video lottery revenues referenced in this analysis represent only those derived from Regular VL Players, or approximately 96% of total monthly VL revenues.) Given the higher incidence of Regular VL Play for men and the fact that male players tend to spend more on VL games in a month, on average, than female players, it is not surprising to see that men generate 68% of the video lottery revenues from all Regular Players in a given month, even though they only account for 48% of the Nova Scotian adult population.

**TABLE 2.6.12
TOTAL MARKET DEMOGRAPHIC PROFILE FOR REGULAR VL PLAY**

	Percent of Population	Percent of Regular VL Players	Percent of Adults	Percent of Category Playing	Average Expenditure for Regular VL Players *	Average Expenditure for Adults *	Percent of VL Revenue
Percent of Adults	100%	100%	16.5%	6%	\$197.31	\$11.74	100%
Gender:							
Male	48%	62%	3.6%	7%	\$218.22	\$16.65	68%
Female	52%	38%	2.2%	4%	\$163.14	\$7.24	32%
Age Category:							
19 - 24 years	6%	19%	1.1%	18%	\$175.17	\$32.23	17%
25 - 29 years	9%	14%	0.8%	9%	\$190.04	\$18.08	14%
30 - 34 years	13%	14%	0.8%	6%	\$127.50	\$7.98	9%
35 - 39 years	17%	14%	0.8%	5%	\$207.02	\$10.96	15%
40 - 44 years	10%	12%	0.7%	6%	\$253.35	\$16.33	14%
45 - 49 years	11%	9%	0.5%	5%	\$210.06	\$10.64	10%
50 - 54 years	17%	13%	0.8%	4%	\$203.09	\$8.98	13%
55 + years	17%	6%	0.3%	2%	\$275.59	\$5.41	8%
Marital Status:							
Single	14%	32%	1.8%	13%	\$226.66	\$30.60	35%
Married/Co-habiting	75%	57%	3.3%	4%	\$156.07	\$7.33	47%
Separated/Divorced/Widowed	11%	11%	0.6%	6%	\$324.04	\$18.61	18%
Number Of Adults in Household:							
One	17%	15%	0.8%	5%	\$188.86	\$9.52	14%
Two	64%	55%	3.1%	5%	\$186.68	\$9.68	53%
Three	13%	19%	1.1%	8%	\$222.31	\$18.64	21%
Four or more	5%	11%	0.6%	2%	\$195.37	\$23.83	11%
Number Of Children In Household:							
No children	54%	59%	3.4%	6%	\$214.43	\$13.64	63%
One or more children	46%	41%	2.4%	5%	\$173.17	\$9.47	37%
Total People In Household:							
One	13%	11%	0.6%	5%	\$202.40	\$9.76	11%
Two	34%	31%	1.8%	5%	\$216.29	\$11.98	34%
Three	16%	23%	1.3%	8%	\$210.21	\$17.64	24%
Four	24%	21%	1.2%	5%	\$156.93	\$8.37	17%
Five	9%	11%	0.6%	7%	\$170.64	\$12.80	10%
Six or more	5%	3%	0.2%	4%	▲\$271.98	\$10.94	4%
Household Composition:							
One adult, no children	13%	10%	0.6%	5%	\$202.94	\$9.66	11%
Two adults, no children	31%	28%	1.6%	5%	\$209.03	\$11.50	30%
Three or more adults, no children	11%	20%	1.2%	11%	\$227.87	\$24.35	23%
One adult with children	4%	4%	0.2%	6%	\$154.13	\$9.08	3%
Two adults with children	41%	37%	2.1%	5%	\$168.43	\$9.14	32%

▲ - results should be viewed as preliminary (n>10<30).

* - Average monthly VL expenditure figures are based on expenditures capped at \$2,000 per player. This reduces the reported average expenditure amounts, however, it greatly enhances the ability of the analyst to more accurately identify patterns in play based on demographics.

TABLE 2.6.12 - Continued
TOTAL MARKET DEMOGRAPHIC PROFILE FOR REGULAR VL PLAY

	Percent of Population	Percent of Regular VL Players	Percent of Adults	Percent of Category Playing	Average Revenue for Regular VL Players *	Average Revenue for Adults *	Percent of VL Revenue
Percent of Adults	100%	100%	16.5%	6%	\$197.31	\$11.74	100%
Occupation Category:							
White collar	21%	14%	0.8%	4%	\$147.53	\$6.57	12%
Grey collar	24%	24%	1.4%	6%	\$178.41	\$10.68	22%
Blue collar	20%	35%	2.0%	10%	\$255.47	\$25.50	44%
Income Supported	35%	27%	1.5%	4%	\$166.03	\$7.64	23%
Work Status:							
Employed full-time	51%	60%	3.4%	7%	\$200.00	\$13.95	61%
Employed part-time	14%	13%	0.8%	6%	\$247.93	\$13.84	16%
Unemployed	4%	6%	0.3%	9%	\$202.38	\$18.77	6%
Student	2%	5%	0.3%	17%	\$129.39	\$23.33	4%
Homemaker	12%	6%	0.3%	3%	\$67.07	\$2.39	2%
Retired	15%	7%	0.4%	3%	\$234.09	\$6.21	8%
Disabled	3%	3%	0.2%	▲ 6%	▲\$204.12	▲\$11.79	3%
Education Category:							
Less than Grade 9	9%	6%	0.3%	4%	\$283.63	\$10.90	8%
Grade 9 - 13	34%	45%	2.6%	8%	\$203.11	\$15.83	46%
Trade school/Non-university	24%	26%	1.5%	6%	\$200.56	\$12.90	26%
University without degree	14%	14%	0.8%	6%	\$154.87	\$9.17	11%
University with degree	13%	8%	0.5%	3%	\$143.02	\$5.68	6%
University post graduate degree	6%	1%	0.1%	1%	****	\$3.58	2%
Summary:							
High school or less	43%	51%	2.9%	7%	\$212.31	\$14.81	54%
Trade school/Vocational	24%	26%	1.5%	6%	\$200.56	\$12.90	26%
University incomplete	14%	14%	0.8%	6%	\$154.87	\$9.17	11%
University degree or more	19%	9%	0.5%	3%	\$164.34	\$5.02	8%
Income Category:							
Less than \$10,000	4%	4%	0.3%	6%	\$274.78	\$17.69	6%
\$10,000 - \$25,000	20%	19%	1.1%	5%	\$195.24	\$11.03	19%
\$25,001 - \$35,000	20%	19%	1.1%	5%	\$181.03	\$10.32	18%
\$35,001 - \$45,000	12%	18%	1.0%	9%	\$158.88	\$14.11	14%
\$45,001 - \$60,000	15%	13%	0.7%	5%	\$236.97	\$11.53	15%
\$60,001 - \$75,000	8%	5%	0.3%	4%	\$171.43	\$7.22	5%
More than \$75,000	11%	8%	0.5%	4%	\$202.02	\$9.29	9%
Refused	8%	4%	0.2%	3%	▲\$273.30	\$7.46	5%
Don't Know/Unsure	2%	10%	0.6%	31%	\$198.91	\$61.27	9%
Summary:							
Low - less than \$25,000	24%	23%	1.4%	6%	\$210.48	\$12.15	25%
Medium - \$25,000 - \$45,000	32%	37%	2.1%	7%	\$170.25	\$11.73	32%
High - more than \$45,000	34%	26%	1.5%	4%	\$212.52	\$9.81	29%
Refused/Don't Know	10%	13%	0.8%	8%	\$219.27	\$17.68	14%
Number Of People Contributing To Income:							
One	34%	30%	1.5%	5%	\$193.68	\$9.45	29%
Two	60%	58%	2.9%	5%	\$184.92	\$10.50	56%
Three or more	5%	12%	0.6%	11%	\$239.00	\$26.14	15%

TABLE 2.6.12 - Continued

TOTAL MARKET DEMOGRAPHIC PROFILE FOR REGULAR VL PLAY

	Percent of Population	Percent of Regular VL Players	Percent of Adults	Percent of Category Playing	Average Expenditure for Regular VL Players *	Average Expenditure for Adults *	Percent of VL Revenue
Percent of Adults	100%	100%	16.5%	6%	\$197.31	\$11.74	100%
Mother Tongue:							
English	92%	95%	5.5%	6%	\$199.59	\$12.24	96%
French	8%	5%	0.3%	4%	\$151.79	\$5.60	4%
Area Of Residence:							
Urban	49%	63%	3.6%	8%	\$214.16	\$16.48	68%
Rural	51%	37%	2.1%	4%	\$168.17	\$7.37	32%

▲ - results should be viewed as preliminary (n>10<30).

**** - represents sample sizes too small to be profiled.

2.6.13 Relative Index Values For Video Lottery Play By Demographic Category

In order to illustrate the demographic characteristics of those most likely (and least likely) to adopt regular playing patterns for video lottery games in Nova Scotia, a set of indices was derived. These indices demonstrate the relative magnitude of play (or non-play) within specific demographic segments as compared to play behaviour in the general population and are provided for reference purposes. The index calculations are based on the percentage of those in each demographic category who fall into each of the video lottery population segments, divided by the percentage of total Nova Scotians who fall into each of these segments. These index values indicate, relative to the total adult population, those demographic categories which are most/least likely to exhibit the video lottery play behaviour defined by the VL population segments (i.e., Non-VL Players, Casual VL Players and Regular VL Players). An index value of 1.0 indicates that there is no difference between response for adults within that demographic category and adults in general.

For example, market penetration for non-VL play for males is 53% (i.e., 53% of men are Non-VL Players), while 61.5% of all Nova Scotian adults are Non-VL Players. Dividing these figures yields a relative index value of 0.86, with regard to non-VL play for men in the province. Tests of significance were conducted to determine whether or not the category is *significantly* under- or over-indexing for each measure (at the 90%+ confidence level). In the example, men are significantly *under-indexing* for non-play of video lottery games; scanning across this row in the table shows that Nova Scotian men instead significantly *over-index* for both Casual (1.21) and Regular VL play (1.30) in comparison to adults in general.

These relative index values provide the user with an **at-a-glance assessment of response towards video lottery play by the demographic characteristics of all adults in Nova Scotia**. Scanning down the Regular VLT Players column shows that **those adults in Nova Scotia most likely to adopt regular playing patterns (and, thus, are significantly over-indexing in terms of Regular VL Play) include:**

<u>Demographic Category:</u>	<u>Relative Index Value</u>
Those with other Regular Players in their household	8.15
Those who do not know their annual household income	5.38
Those aged 19 to 24 years	3.06
Students	2.96
Single adults (never married)	2.34
Those living with three or more adults and no children	1.85
Blue collar workers	1.71
Those living in urban areas	1.31
Males	1.30

RELATIVE INDEX VALUES FOR VL POPULATION SEGMENTS - BY DEMOGRAPHIC CATEGORY



	Total Population (n=1088)	Non-VLT Players	Casual VLT Players	Regular VLT Players
Percent of Population:	100%	61.51%	32.76%	5.73%
Gender:				
Male	48%	↓ 0.86	↑ 1.21	↑ 1.30
Female	52%	↑ 1.13	↓ 0.80	↓ 0.73
Age Category:				
19 - 24	6%	↓ 0.34	↑ 1.89	↑ 3.06
25 - 29	9%	↓ 0.65	↑ 1.56	1.60
30 - 34	13%	↓ 0.51	↑ 1.91	1.06
35 - 39	17%	0.98	1.06	0.85
40 - 44	10%	0.98	1.03	1.11
45 - 49	11%	1.09	0.85	0.85
50 - 59	17%	↑ 1.25	↓ 0.58	0.76
60+	17%	↑ 1.50	↓ 0.18	↓ 0.34
Marital Status:				
Single/Never married	14%	↓ 0.72	↑ 1.29	↑ 2.34
Married/Co-habiting	75%	1.00	1.03	↓ 0.77
Divorced/Widowed/Separated	11%	↑ 1.28	↓ 0.47	0.99
Number Of Adults In Household:				
One	17%	1.09	0.85	0.86
Two	64%	0.99	1.04	0.85
Three	13%	0.93	1.05	1.46
Four or more	5%	0.90	0.99	↑ 2.09
Number Of Children In Household:				
No children	54%	↑ 1.14	↓ 0.72	1.08
One or more children	46%	↓ 0.83	↑ 1.34	0.91
Total People In Household:				
One	13%	↑ 1.17	↓ 0.71	0.82
Two	34%	↑ 1.16	↓ 0.71	0.92
Three	16%	↓ 0.69	↑ 1.50	1.46
Four	24%	0.94	1.13	0.88
Five	9%	0.96	1.03	1.25
Six or more	5%	↓ 0.78	↑ 1.47	0.63
Household Composition:				
One adult, no children	13%	↑ 1.17	↓ 0.71	0.81
Two adults, no children	31%	↑ 1.20	↓ 0.65	0.91
Three or more adults, no children	11%	0.97	0.91	↑ 1.85
One adult with children	4%	0.86	1.26	0.99
Two adults with children	41%	↓ 0.82	↑ 1.35	0.90
Household VLT Play:				
Other Casual VLT Players in Household	11%	↓ 0.56	↑ 1.76	1.39
Other Regular VLT Players in Household	3%	↓ 0.62	↓ 0.46	↑ 8.15


↑ ↓ - indicates over-indexing or under-indexing for each VL population segment, within each demographic category, significant at the 90%+ confidence level when compared to adults in general.

RELATIVE INDEX VALUES FOR VL POPULATION SEGMENTS - BY DEMOGRAPHIC CATEGORY - Continued

	Total Population	Non-VLT	Casual VLT	Regular VLT
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	(n=1088)	Players	Players	Players
Percent of Population:	100%	61.51%	32.76%	5.73%
Occupation Category:				
White collar	21%	↓ 0.90	↑ 1.25	0.70
Grey collar	24%	↓ 0.92	↑ 1.15	1.02
Blue collar	20%	↓ 0.76	↑ 1.32	↑ 1.71
Income Supported	35%	↑ 1.26	↓ 0.55	0.76
Work Status:				
Employed full-time	51%	↓ 0.81	↑ 1.32	1.17
Employed part-time	14%	1.03	0.94	0.96
Unemployed	4%	0.95	1.00	1.51
Student	2%	↓ 0.45	↑ 1.69	↑ 2.96
Homemaker	12%	1.23	↓ 0.66	0.51
Retired	15%	↑ 1.53	↓ 0.10	↓ 0.46
Disabled	3%	▲ 0.92	▲ 1.15	▲ 1.01
Education Category:				
Less than grade 9	9%	↑ 1.15	0.78	0.65
Grade 9 - 13	34%	1.01	0.93	1.32
Trade school/Non-University	24%	↓ 0.85	↑ 1.27	1.09
University without degree	14%	1.07	0.87	0.97
University with degree	13%	1.05	0.98	0.61
University post graduate degree	6%	1.07	1.01	↓ 0.21
Summary:				
High school or less	43%	1.04	↓ 0.89	1.18
Trade school/Vocational	24%	↓ 0.85	↑ 1.27	1.09
University incomplete	14%	1.07	0.87	0.97
University degree or more	19%	1.05	0.99	↓ 0.48

  - indicates over-indexing or under-indexing for each VL population segment, within each demographic category, significant at the 90%+ confidence level when compared to adults in general.

 - due to small sample sizes ($10 < n < 30$), results should be viewed as exploratory.

RELATIVE INDEX VALUES FOR VL POPULATION SEGMENTS - BY DEMOGRAPHIC CATEGORY - Continued

	Total Population (n=1088)	Non-VLT Players	Casual VLT Players	Regular VLT Players
Percent of Population:	100%	61.51%	32.76%	5.73%
Income Category:				
Less than \$10,000	4%	↑ 1.32	↓ 0.38	1.12
\$10,000 - \$25,000	20%	↑ 1.13	↓ 0.77	0.96
\$25,001 - \$35,000	20%	1.02	0.98	0.93
\$35,001 - \$45,000	12%	↓ 0.88	1.14	1.50
\$45,001 - \$60,000	15%	↓ 0.85	↑ 1.30	0.83
\$60,001 - \$75,000	8%	↓ 0.83	↑ 1.37	0.70
More than \$75,000	11%	0.94	1.16	0.72
Refused	8%	↑ 1.27	↓ 0.59	0.47
Don't know/Unsure	2%	↓ 0.68	0.84	↑ 5.38
Summary:				
Low - less than \$25,000	24%	↑ 1.16	↓ 0.70	0.99
Medium - \$25,000 - \$45,000	32%	0.97	1.04	1.14
High - more than \$45,000	34%	↓ 0.88	↑ 1.27	0.76
Refused/Don't know	10%	↑ 1.15	↓ 0.64	1.40
Number Of People Contributing To Income:				
One	34%	1.02	0.99	0.83
Two	60%	0.97	1.06	0.93
Three or more	5%	0.87	1.09	1.91
Mother Tongue:				
English	92%	1.00	1.00	1.03
French/Other	8%	1.03	1.01	0.64
Area Of Residence:				
Urban	49%	0.97	1.00	↑ 1.31
Rural	51%	1.02	1.01	↓ 0.72

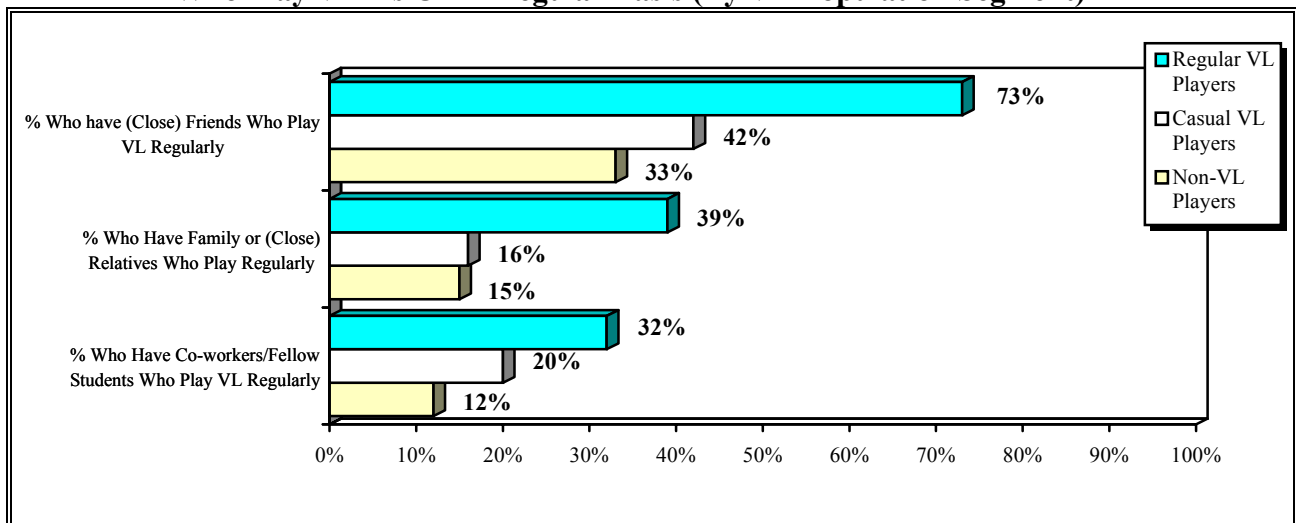
↑ ↓ - indicates over-indexing or under-indexing for each VL population segment, within each demographic category, significant at the 90%+ confidence level when compared to adults in general.

2.7 Impact of Exposure To VL Play

As noted previously, adults who are Regular (10.8 times per month), Casual (4.4 times) and Non-VL Players (2.2 times) in Nova Scotia are not surprisingly differentiated by the frequency they are in locations which have video lottery machines. This is largely a function of the current distribution strategy for VLT's in the province, and is influenced by demographic characteristics and lifestyles. However, adults in Nova Scotia can also be exposed to VL gaming both directly and indirectly through their relationship with other adults who play the games.

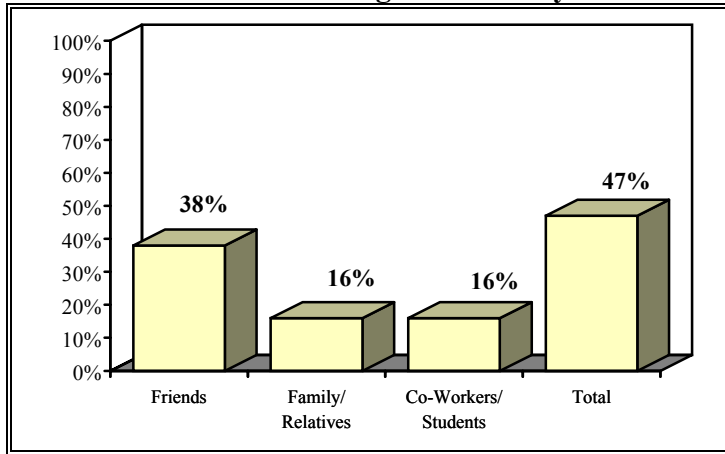
2.7.1 Percentage of Adults Who Have Exposure to VL Play Through Others

Percentage Who Have Family, Friends And/Or Co-Workers Who Play VLT's On A Regular Basis (By VL Population Segment)



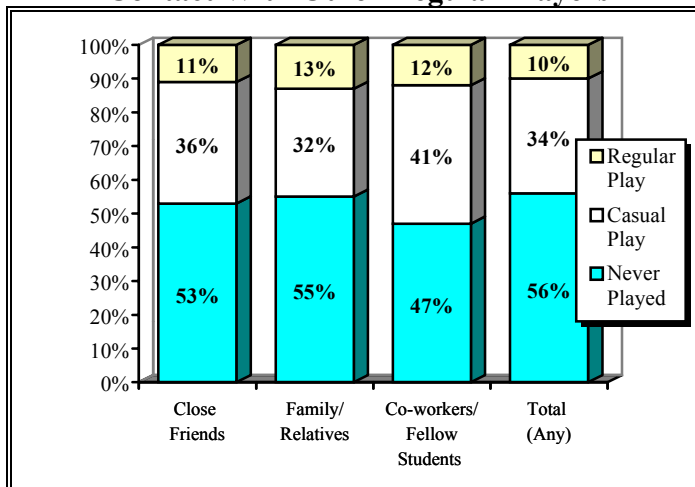
Regular VL Players are significantly more likely to have friends (73%), family (39%) and co-workers or fellow students (32%) who are also Regular Video Lottery Players. **In fact, 83% of all those who currently play the games on a regular basis have at least one other significant person in their lives involved in regular video lottery gambling, as compared to only 49% of Casual Players and 42% of Non-VL Players.**

Percentage of All Adults Who Have Contact With Regular VL Players



What is of particular interest is that, overall, only 5.7% of adults are identified as Regular Video Lottery Players in Nova Scotia and, yet, 47% of all adults in the region state they have fairly close personal contact with someone who plays the games on a regular basis. This would suggest that almost 320,000 adults in Nova Scotia have contact with someone who plays VLT's on a regular basis which translates to, on average, 8.2 adults for every 1 Regular Player in the province.

Penetration of VL Play By VL Players' Contact With Other Regular Players



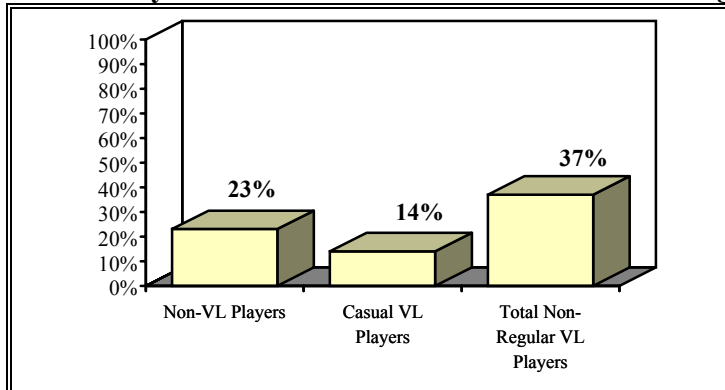
It is reasonable to expect Regular VL Players to be more aware of those adults in their lives who also are involved in VL gambling on a regular basis. However, Regular VL Players only comprise 10% of all those adults who have close friends, family or co-workers who play VLT's each month. The remaining 90% ($\approx 287,000$ adults in Nova Scotia) do not play VL games regularly themselves, yet report having relatively close contact with at least one Regular VL Player. In fact, approximately one-third (34%) of these non-playing adults either live with a Regular Player or have a close relative

playing the games on a regular basis.

2.7.2 Percentage of Non-Regular VL Players Who Have Personal Knowledge of Someone With a VL Problem

In some cases, those who do not participate in video lottery gambling may be over-estimating the frequency of play for those who do. This tends to be emphasized somewhat by the percentage of Non-Regular VL Players who state they have personal, first-hand knowledge of someone with a problem with VL gambling.

Percentage of Non-Regular VL Players Who Know Personally of Someone With VL Problem Gambling



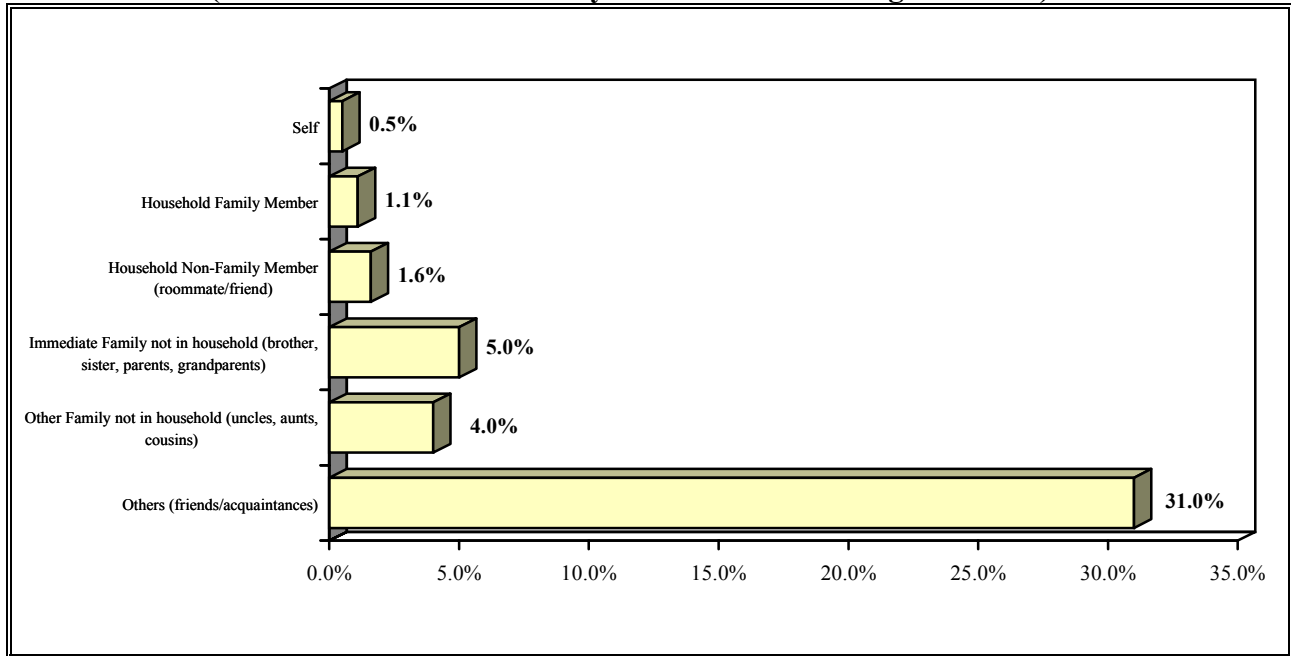
Overall, 37% of all adults in Nova Scotia who do not play VL games on a regular basis personally know of someone who they believe is experiencing problems with this type of gambling. Surprisingly, Non-VL Players are significantly more likely to report knowing someone with a VL gambling problem than Casual Players (23% versus 14%). This appears to be somewhat contradictory, as Casual Players are more inclined than Non-

Players to live in households with adults who at least play VL games on a periodic basis. Furthermore, due to their tendency to be younger than Non-VL Players and to be in bar locations more often, presumably, Casual VL Players should have greater exposure to those who play VL games on a regular basis. It can be argued that the greater experience with and exposure to VL gambling for Casual Players may make them more sensitive to the differences between social and problem VL play. For Non-VL Players, and, thus, the majority of adults in Nova Scotia, it may be more difficult to differentiate between frequency of playing the games and problem VL play such that the two types of players are evaluated as the same. Media coverage of the issue with a heavy emphasis on a minority of adults who have experienced extreme problems associated with video lottery gambling may serve to further sensitize adults in Nova Scotia to an association between VL play in general and problem gambling. However, it may also be that even frequent play of VL games has consequences for others.

In the face of growing concerns and media evidence that video lottery gambling leads to problems for some players, and in light of the extremely high revenues generated by VLT gaming by such a small portion of the population, it is not surprising that those who have little to no personal experience with play are very concerned when family members or close friends take up play of the games. Similar to response towards other activities or substances which appear to have potential for addiction, there is a greater tendency to view any “heavy” use as addictive, problem behaviour. Thus, any VL play by “those you care about” could be considered risky and ill-advised behaviour and may be contributing to the growing emergence of “zero tolerance” for the activity.

Based on players’ responses, behaviours and attitudes, it has been estimated that approximately 16% of all Regular VL Players in Nova Scotia can be characterized as problem VL gamblers (see Section 3.0). This group comprises 0.92% of the population, or approximately 6,250 adults in the province, who are experiencing significant difficulties and/or distress as a result of their VL gambling. For the remaining Regular VL Players in Nova Scotia, 46% are identified as Infrequent Regular Players (less than 4 times per month) and 38% are Frequent (Non-Problem) Players (4 or more times/month). However, although only 16% of Regular Players are profiled as Problem VL gamblers, there may also be adverse effects for those adults who are living with or are close to Frequent Non-Problem Players.

**Relationship To Problem VL Gambler
(For Those Who Do Not Play VL Games On A Regular Basis)**



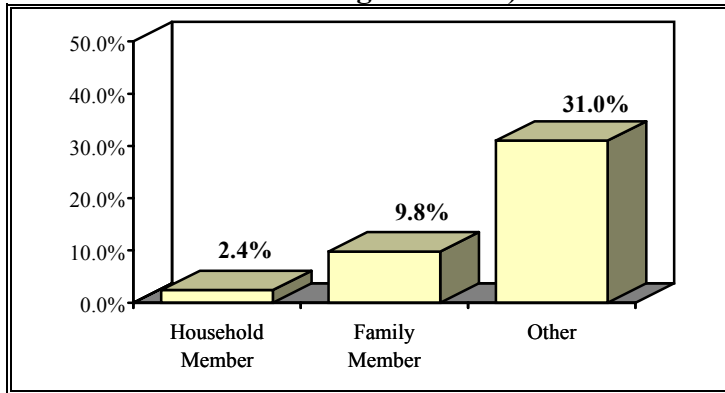
All adults who do not play video lottery games on a regular basis (94.2% of adult population in Nova Scotia) were asked to identify their relationship to those Problem VL Players they personally know. Approximately 0.5%, or 3,200 adults in Nova Scotia, reported that they themselves have experienced problem play of video lottery in the past and have subsequently stopped playing the games.

In order to assess the impact of VL problem play for those adults in Nova Scotia who do not play the games on a regular basis, all Problem Players personally known to these adults were grouped into three categories based on the level of that relationship:

- **Household Member** - either immediate family member or someone who lives directly in the household;
- **Family Member** - any related individual including family members living in the household or extended family living outside the household (spouse, children, parents, grandparents, aunts, uncles, cousins);
- **Others** - friends, acquaintances, co-workers, colleagues, excluding household or family members.

The categories are not mutually exclusive (i.e., there is overlap among the three categories). Furthermore, some people know two or more problem VL gamblers who may be classified into different categories. Therefore, direct comparisons (tests of significance) cannot be conducted among the three categories.

**Relationship To Problem VL Gamblers by Category
(For Those Who Do Not Play VL Games
On A Regular Basis)**



In total, there are 2.4%, or approximately 15,375 adults (Non-Regular VL Players) in Nova Scotia who report that they are currently living with someone who has, or has had, a VL gambling problem. Almost 20% of these adults are including their own past play of the games and in 25% of the cases, there is more than one Problem Player in their households.

On average, Problem VL Gamblers identified in the VL Players' Survey

(see Section 3.0) have 1.3 other adults living in their households. This would suggest that approximately 8,125 adults in Nova Scotia (6,250 players X 1.3 = 8,125) are presently living with Problem VL Players, as based on current problem play behaviour by Regular VL Players. There is an additional 9% of Regular VL Gamblers who indicate they have experienced problems in the past, but have resolved their difficulties. This represents an additional 0.51% of adults who have experienced problems with their VL gambling and are continuing to play on a regular basis. On average, these players have 1.1 other adults living in their households (3,450 X 1.1 = 3,795). Therefore, it can be estimated that approximately 11,950 adults reside with a current Regular VL Player who has, or has had, problems with their VL gambling. This estimate is lower than the numbers of adults who report they are living with a Problem VL Gambler, as compared to the actual proportion who reside with a current Problem Player (15,375 versus 11,950).

Part of the discrepancy between the two measures is due to the fact that not all the Problem VL Players living in households in Nova Scotia **are still playing the games**, whereas the actual number of those players who are having, or have had, problems represent only current players. Given that approximately 1.4% of adults in Nova Scotia have stopped playing VLT's in the past, due to either time or money problems with play (Section 2.1), this would suggest that the actual proportion of adults in Nova Scotia **with current or past problems** with VL play will be higher than 0.92%. **If all those adults who stopped playing as a result of a self-declared problem with VL play are included, estimates of problem play, past and present, would reach approximately 2.8%, or approximately 19,100 adults in Nova Scotia. It is not surprising, therefore, that 2.4% of all adults who do not currently play VL games would state either they themselves or someone they live with has had a problem with video lottery gambling.**

As noted previously, even frequent VL play may be causing household or personal problems for those associated with the player. While the actual player is involved in personally non-problematic play, other family or household members may still be finding the amount of time and/or money allocated to the activity as problematic either due to concerns about the player or because of inconveniences or absences associated with their play. **Therefore, although only**

0.92% of adults in Nova Scotia are currently characterized as Problem VL Gamblers, even heavy play may have consequences for other family members.

Estimates of problem VL play based on adults' familiarity with someone outside their own household who has a problem will tend to grossly exaggerate the incidence of Problem Players in the province for two reasons:

1. there will be a tendency to over count, as several people can be aware of one Problem Player;
2. the identification of problem play may be based on hearsay, as opposed to actual behaviour by the individual and, thus, subject to misrepresentation and misinterpretation.

However, having individuals estimate problem VL play by adults outside their immediate households does provide an indication of the extent to which VL play is associated with problems by the general population. It also indicates the magnitude of the impact a small proportion of Problem VL Players may have on adults in general in Nova Scotia.

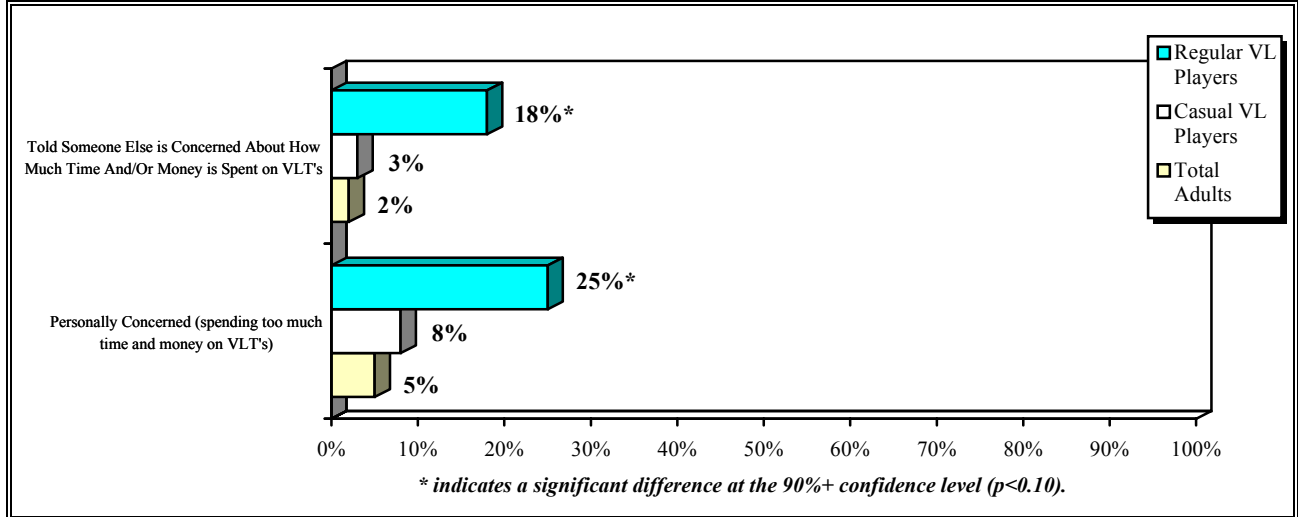
In total, 9.8% of adults who do not play VLT's on a regular monthly basis believe that one or more people in their households or related to their immediate families (including siblings, parents, grandparents and extended family) have a problem with video lottery gambling. This represents approximately 63,000 adults in Nova Scotia, or approximately 3.3 adults for every Problem VL Player (past or present) in the province ($63,000 \div 19,100$).

Thirty-one percent (31%) of Non-Regular VL Players ($\approx 198,000$) report having friends or acquaintances who have problems with video lottery gambling. In fact, 84% of these adults who know of someone with a VL problem cite play behaviour by friends and acquaintances. Thus, for the majority of adults, problem play tends to have less direct impact on their personal lives. Given that Regular VL Players tend to have fairly socially active lifestyles and higher involvement with others (especially friends), it may not be surprising that such a large percentage of adults feel that they have friends involved in problem VL play (although, in some cases, frequent play may also be contributing to impressions that individuals are having difficulty with their video lottery gambling).

When all Non-Regular Players in the province who state they personally know of someone with a VL gambling problem are considered (based on past and present problem play levels), it can be estimated that there are approximately 10.4 adults who know a Problem VL gambler for each individual Problem Player in Nova Scotia (including both current and past problem players).

2.7.3 Efforts to Control Play (Self/Others)

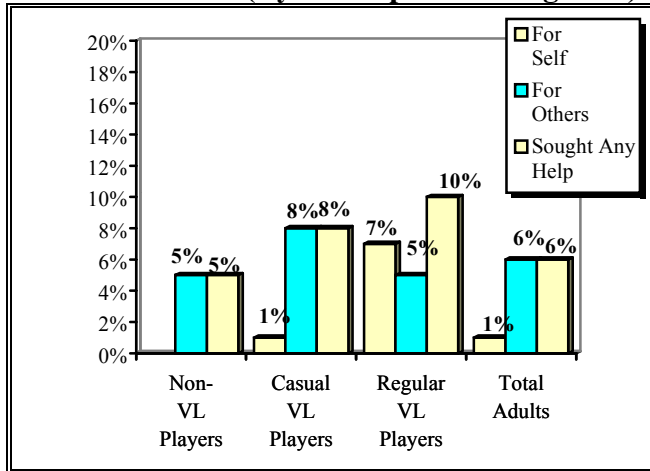
Percentage of All Those Who Have Ever Tried VL Gaming Who Were Concerned With Play



In total, 2% of all adults in Nova Scotia (≈13,600 adults) have been told by someone else that they were concerned about the amount of time and/or money they were spending on video lottery games. As would be expected, Regular VL Players are significantly more likely to have been approached by concerned friends and family members than Casual Players (18% versus 3%). However, Casual VL Players make up half (51%) of all those who have had someone else intervene or comment on their play. This intervention by a significant person in their lives may have contributed to a Casual Player adopting less regular play levels and, ultimately, achieving success in controlling their play.

It is noteworthy that, although only 2% of adults have been warned by someone else, over twice as many (5%) have had personal concerns regarding their VL play. The results suggests that at some time (past and present) as many as 34,000 adults in Nova Scotia have felt they were spending too much money and/or time playing video lottery games. Regular VL Players are more likely to have, or to have had, concerns in this regard, as compared to Casual VL Players (25% versus 8%). Again, due to the fact that Casual Players comprise a larger proportion of the population, those who currently play VLT's on only a casual basis account for half (52%), or approximately 17,830 adults in Nova Scotia, who have ever been concerned about their play of VL games. This suggests that these players deliberately reduced play levels or stopped playing in order to control their play, and it appears that their efforts have been effective in managing play of the games.

Those Who Have Ever Sought Assistance For Self or Others (By VL Population Segment)



Overall, 6% of all adults (~40,800) in Nova Scotia have sought assistance or information for help in controlling video lottery play at some time. Primarily, it is the play of others which is motivating adults to seek assistance. **In fact, approximately 83% of all those who have sought VL gambling assistance were doing so in an attempt to help others control their play of the machines. Only 1% of adults (~6,800), or ~17% of the 40,800 adults seeking problem gambling support, were doing so in order to control their own VL gambling problems. Thus, it would**

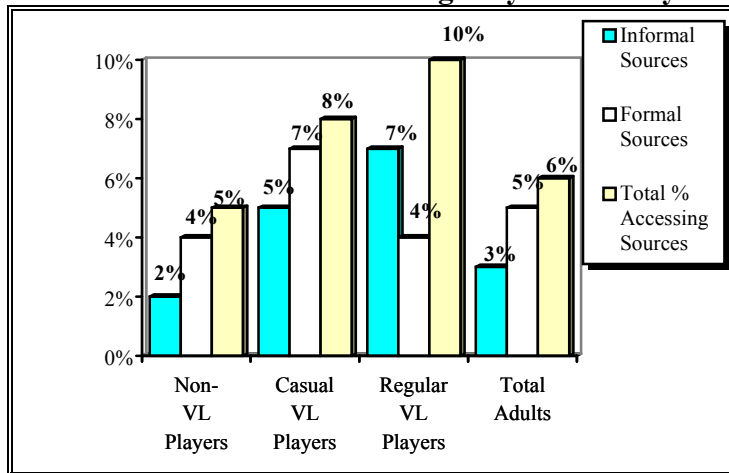
appear that the majority of those accessing problem gambling support and services are friends and relatives of the problem gambler. This has implications for the delivery of problem gambling information and the coping strategies provided. In particular, 5% of those who have never played VL games (Non-VL Players) have sought assistance for others. Adults with no personal experience of play comprise almost half of all those who have tried to obtain help for someone else's VL gambling problem. For the most part, they will be unfamiliar with the game technology and/or play habits and may be unable to provide specific information on play. Educating the individual who is trying to obtain the information on VL play may be part of the necessary service provided by front-line problem gambling workers (service providers).

EFFORTS TO CONTROL VL PLAY (SELF/OTHERS)

	Non-VLT Players (n=246)	Casual VLT Players (n=131)	Regular VLT Players (n=711)	Total Population (n=1088)
Percent of Population	61.5%	32.8%	5.7%	100%
SOURCES ACCESSED TO OBTAIN HELP OR INFORMATION ON CONTROLLING PLAY OF VIDEO LOTTERY GAMES...				
Total (i.e., accessed for self and/or someone else):				
Spouse/Partner	2%	2%	4%	2%
Other family members, household	2%	2%	2%	2%
Friends	1%	2%	4%	2%
Family doctor, therapist	2%	4%	2%	2%
Gambling self-help group/Gamblers Anonymous	1%	2%	1%	2%
Drug Dependency Services/Detox	1%	2%	1%	2%
Church/Religious groups	1%	3%	1%	2%
Employer/Colleagues	<1%	2%	1%	1%
Gambling Help Line	1%	1%	1%	1%
Community center/Counselor	1%	1%	1%	1%
Other (See verbatim listing)	<1%	2%	<1%	1%

2.7.4 Use of Formal Versus Informal Gambling Support Services

Sources Accessed to Obtain Help or Information on Controlling Play of VL Play



To identify any differences in the types of sources accessed to obtain information on problem VL gambling, potential sources were segmented into the following two groups:

- ♦ **Informal Information Sources** - including spouse/partner, other family members/household members, employers/colleagues/co-workers, friends;
- ♦ **Formal Information Sources** - church/religious groups, doctor/therapist, gambling self help

groups, Drug Dependency/Detox, Gambling Help Line, community centre counselor, other service providers.

It is noteworthy that, **in general, adults in Nova Scotia are more likely to access formalized services to assist with problem VL gambling (5%) than to go to friends or family members (3%).** There is quite often an overlap in the sources accessed. In fact, 66% of those who have sought help through informal avenues (friends/family) have also sought assistance through more formalized services. It may be that friends, family or co-workers encourage those seeking information to contact organizations who they feel will be able to provide more accurate or effective help and/or information. Interestingly, only 41% of those who have contacted formal organizations for assistance also have gone to friends, family or informal sources for help.

The results then suggest that only one-third of those who have tried to get information or help on problem VL gambling by speaking to friends or family have not pursued the issue further with formalized service providers. This translates into 1% of all adults in Nova Scotia, or approximately 16% of those seeking help or information on problem VL play. **Thus, 84% of those seeking assistance eventually go to organizations outside their friends and family.**

In total, 10% of Regular VL Gamblers (≈3,300 adults) have attempted to get help or information on VL gambling. Compared to all other adults in the region, Regular VL Gamblers are significantly more likely to seek assistance from informal sources. In fact, they tend to access friends and family almost twice as much for help than other outside organizations (7% versus 4%). Approximately 80% of those Regular Players seeking assistance were motivated to do so by their own play, with approximately 55% seeking information/help for other Regular VL Players. This means just over one-third (35%) of Regular VL Gamblers seeking help have done so both for themselves and other players they know. **Thus, Regular VL Gamblers will often be a source of information and/or assistance for other players when trying to control or manage their play.**

The use of formal versus informal gambling support tends to be reversed for Regular VL Players, as compared to the rest of the population; only 35% of those who go to friends or family for help also reference more formalized services, whereas 64% of those who use formal problem gambling service providers have also gone to friends or family for support. It appears that, in many cases, the players themselves are initiating or motivating efforts by other adults to seek information from formal sources. Overall, 54% of Regular Players who have sought help have exclusively relied on informal sources such as friends and family members versus only 16% who have solely used formal problem gambling services. **This means a total of 84% of all Regular VL Players seeking help go to friends and family for assistance. This underscores the importance of friends and family members in providing information and support to those players experiencing difficulties.**

Aside from a greater tendency for Regular VL Gamblers to go to their spouse/partner or to friends for help, there are no appreciable differences in the percentage of adults in any of the three population segments using specific formal sources for information or assistance.

Church groups, Drug Dependency and gambling self help groups (Gamblers Anonymous) are all equally likely to be contacted by those experiencing problems, either directly or indirectly, with VL gambling. It is estimated that 2% of adults in Nova Scotia, have used each of these services in the past in specific relation to VL play. However, there appears to be a fair amount of overlap in use of these three service providers by Regular Players, whereas other adults are more inclined to use only one of the three. This suggests that once Regular VL Players have finally undertaken to get assistance from formalized services, they are more motivated to explore all the various support options available.

Employers (1%) and community centres or counselors (1%) are used less often. However, approximately 6,800 adults in Nova Scotia have gone to each of these sources for help with problem VL play at some time.

A similar proportion have also accessed the Gambling Help Line (1.1%). Specifically, the results suggest approximately 500 - 600 current Regular VL Gamblers seeking information or help with VL play have personally accessed the line at least once in the past. However, as noted for gambling support services in general, a large proportion of those calling the 1-800 Help Line will be spouses, friends, family members or other adults seeking to assist someone significant in their lives with a VL gambling problem.

NOTE: Refer to Section 3.10.5, Nature of Contacts With Sources of Help and Section 3.10.6, The Use & Value of Specific Sources for Help or Information for the evaluation of Problem Gambling support services exclusively by Regular and Problem VL Gamblers.

3.0 *PROBLEM VL GAMBLER ANALYSIS*

Introduction

The primary purpose of the Problem VL Gambler Analysis is **to identify distinctive characteristics and behaviours of the Regular VL Players who are experiencing difficulties with video lottery gambling, in order to gauge and evaluate the nature and causes of problem play.** The original project objectives specified a comparison and profile of Infrequent, Frequent, Problem and Pathological VL Gamblers, to identify possible causes and risk factors associated with problem and pathological play, as well as to identify Problem VL Gamblers in the field.

However, given the debate surrounding the issue of pathological versus problematic gambling, as well as the utility of existing gambling screens (Dickerson, 1993; Volberg, 1996; Walker and Dickerson, 1996), in discussion with DOH officials, the requirement to identify and profile pathological gamblers was eliminated from the study. A revised and expanded definition of problem VL play was adopted which had implications for questionnaire design.

Current measures to classify individuals as probable, problematic and pathological gamblers (e.g., South Oaks Gambling Screen (SOGS), DSM IV) require that respondents be directly asked questions dealing with attempted suicide, stealing to pay gambling debts and other potentially sensitive questions. Typically, these gambling screens have been designed for and tested with clinical populations (those currently seeking or receiving treatment within organized and/or clinical settings). The survey instruments are not designed nor validated for use in random sampling of adults and gamblers in the general population. Furthermore, the effects of revising the questions for specific use with video lottery gambling is unknown (Lesieur and Blume, 1987; 1993; Lesieur, 1994).

At present, there is little information on what constitutes and characterizes “normal” or typical VL play and, therefore, on what differentiates problem from non-problematic video lottery gambling. It may be that many individuals perceive their VL gambling to be problematic prior to resorting to the more extreme behaviours typically associated with “pathological” gambling. In some cases, individuals may never qualify in terms of pre-set criteria and, yet, experience significant difficulties in regard to VLT's. Conversely, for some individuals, involvement in extreme behaviours or consequences is not necessarily exclusive to their VL gambling. Instead, it may be indicative of other, more general compulsive disorders or “an addictive personality” for which VL gambling is the current trigger or addicting activity. Undoubtedly, the continuous nature of VL gambling and the easy accessibility to play should make players with pre-existing addictive or compulsive disorders particularly vulnerable to developing compulsive VL gambling behaviour. However, it is often unclear as to whether or not individuals who resort to stealing or other illegal activities in order to finance (or facilitate) their VL gambling have engaged in similar behaviour (to a lesser or greater extent) to fund other activities, or the acquisition of other items or substances. This may also be true for other criteria associated with pathological gambling such as arguments with significant friends or family members, suicidal ideation or depression. It is often difficult to determine the causal relationship between the problem gambling and the associated criteria, as measured by SOGS or the DSM IV.

Given the objectives of the study and concerns surrounding the efficacy of adapting existing gambling screens, extensive exploratory research was undertaken to specifically assist in questionnaire development, project design and the subsequent identification of Problem VL Gamblers. (See Section 1.0 Introduction and Background.) The final draft of the survey was field tested through a Pilot Study (n=88).

Based on the results of the Pilot Study for the project, Focal Research recommended the use of a multi-item measure that would also allow respondents to self select for membership in the Problem VL Gambler segment. The rationale underlying this approach assumes that, regardless of the tendency for an individual to be involved in (or to report honestly on) specific behaviours demonstrated to be associated with problem gambling (e.g., suicide, theft), the subjective experience of the individual in terms of their gambling will be an important indicator of those who are experiencing difficulty in managing or controlling their VL gambling. This means that those who feel their VLT gambling is problematic should be considered in an analysis of problem play, regardless of their qualifications on other behavioural or attitudinal measures. Furthermore, those who report they are having "problems" are more likely than other VL gamblers to seek assistance and/or information on VL gambling from the various support and service providers in Nova Scotia. They are also the individuals most likely to benefit from assistance, given that they (already) recognize VL gambling is problematic for them. (For a detailed explanation of the Problem VL Gambler classification method employed for this study, see "Identification of Problem VL Gamblers" in this section.)

Methodology:

The VL Players' Survey was conducted by telephone with 711 randomly selected adults in Nova Scotia who, based on their play behaviour over the past three months, played video lottery games at least once a month or more. Data collection for the study took place from October 12, 1997, to January 19, 1998 (interviews were suspended over the holiday season (December 18 to January 2/98) to avoid compromising response rates for the project).

During data collection, a random sample of 11,691 households in Nova Scotia were initially contacted for participation in a household screening survey. The Household Screen consisted of a brief five-minute survey which identified the total number of adults (19+ years) in the household and, for each adult household member, past involvement in four broad gaming activities, including video lottery. Those who had ever played VL games were further screened for regular, or past regular, playing patterns with those playing, on average, once a month or more referred to the Players' Survey. A list of lapsed regular players was also compiled at this time for future research consideration (n=197). Each household member was screened individually, as it was found that one adult was not necessarily aware of another household member's involvement in video lottery play.

Of the 11,691 households sampled, a total of 9,339 households and 18,650 adults in Nova Scotia were successfully screened, yielding a response rate of 79.9% for the Household Screen. Within this sample, 927 Regular VL Players were identified and 711 (76.7% of all those qualified) completed the VL Players' Survey. The overall response rate for the survey was 61.3%. This means that approximately 61.3% of all Regular Video Lottery Players in the original 11,691 households, randomly sampled, successfully completed the questionnaire. Thus, the results of

the study are considered representative and are generalizable to the population. While it is recognized that the sampling procedure for the project excludes those adults in institutions and transient or homeless adults, according to Statistics Canada 1997 estimates, 98.3% of Nova Scotians currently live in private households. It can be assumed that those adults living in households differ significantly from transient, institutionalized adults or those who are not living in households. Therefore, these adults should be examined using a separate and more appropriate survey approach which is beyond the scope of this current study.

The VL Player interviews ranged from thirty minutes to two hours, with an average of approximately forty-eight minutes in length. There was only one refusal in progress. In order to maximize participation rates and enhance the accuracy and honesty of the information collected, the surveys were conducted at the convenience of the respondent (e.g., Sunday morning when a spouse was at church, 6:00 a.m. when a spouse/partner was working back-shift, or repeated callbacks to ensure the respondent had sufficient privacy and time to complete the survey). On average, there were 76 calls placed per completed survey (including completing the household screen), for a total of approximately 54,036 calls. Upon completion of the survey, 482 Regular Players (68%) agreed to join Focal Research Consultants Ltd.'s confidential research panel for on-going study related to video lottery play.

The Regular VL Players participating in the survey were segmented into three distinct player groups:

1. **Infrequent VL Players** (n=327; 46% of Regular Players)

- ♦ those who are involved in VL gambling three times per month or less often;
- ♦ average times played per month = 1.6

2. **Frequent VL Players** (n=267; 38% of Regular Players)

- ♦ those who are involved in VL gambling four or more times per month;
- ♦ on average, Frequent VL Players play VLT's just as often as Problem VL Gamblers (7.2 versus 8.0)

3. **Problem VL Gamblers** (n=117; 16% of Regular Players)

- ♦ those individuals classified/identified as Problem VL Gamblers;
- ♦ on average play VLT's 8.0 times per month.

Identification Of Problem VL Gamblers

Current VL Players were classified as Problem VL Gamblers based on the results of three independent measures:

1. A derived multi-item attitude score of 16+ on 6 key statements associated with problem VL gambling (based on pilot testing);
2. A rating of 5 or higher on a 10-point scale, where 1 means “your” VL play is not at all a serious problem, and 10 means your VL play is a serious problem (self-designated score);
3. Respondent indication they have ever spent more time or money playing VL games than they should, and that the problem is still unresolved or only partially resolved (self-designated score).

Respondents had to qualify on at least two of the three measures before being included in the Problem VL Gamblers segment. There were 105 Regular VL Players who met this nominating criteria. There were twelve respondents who did not qualify on the first two measures, yet stated unequivocally they are currently experiencing problems with their VL play and have not yet resolved the problem. Given these players’ perceptions of their VL gambling, it was decided these individuals must be included in the Problem VL Gamblers segment.

1. Derived Multi-Item Attitude Score

The six item attitude measure was developed during the pilot phase of the project using Principal Component Analysis.

	Strongly Disagree				Strongly Agree
I sometimes feel guilty about how much <u>time</u> I spend playing VL games	1	2	3	4	5
I play video lottery games to forget my troubles or worries	1	2	3	4	5
I have friends or family members who worry or complain about me playing VL games	1	2	3	4	5
My VL play has put a strain on my relationships at home	1	2	3	4	5
I have lied about my VL gambling	1	2	3	4	5
I sometimes feel guilty about the amount of money I spend on VL games	1	2	3	4	5

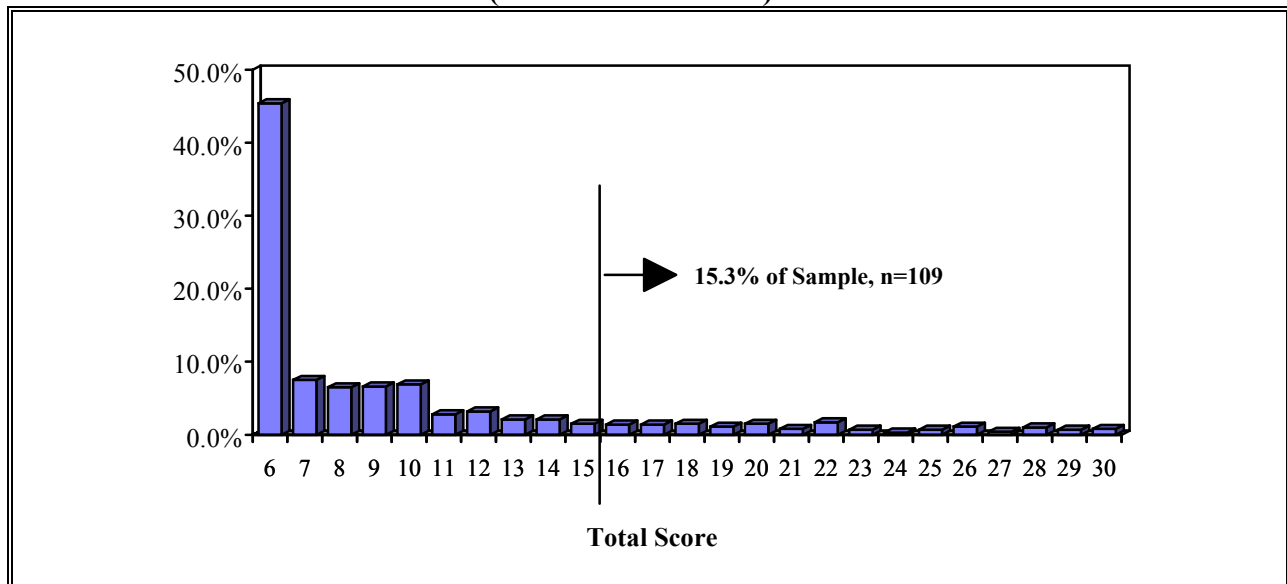
At the pilot stage of the study, the multi-item attitude measure was found to be reliable (Cronbach’s Alpha = 0.869¹), indicating all six items are measuring the same underlying

¹ Cronbach’s Alpha is a commonly used measure of reliability for a set of two or more construct indicators. Values range between 0 and 1.0, with high values indicating higher reliability among the indicators.

construct. It was assumed that the Alpha would drop to some extent when calculated using a different sample. However, Cronbach's Alpha remained constant at 0.862 in the VL Player Survey, again indicating the measure is highly reliable.

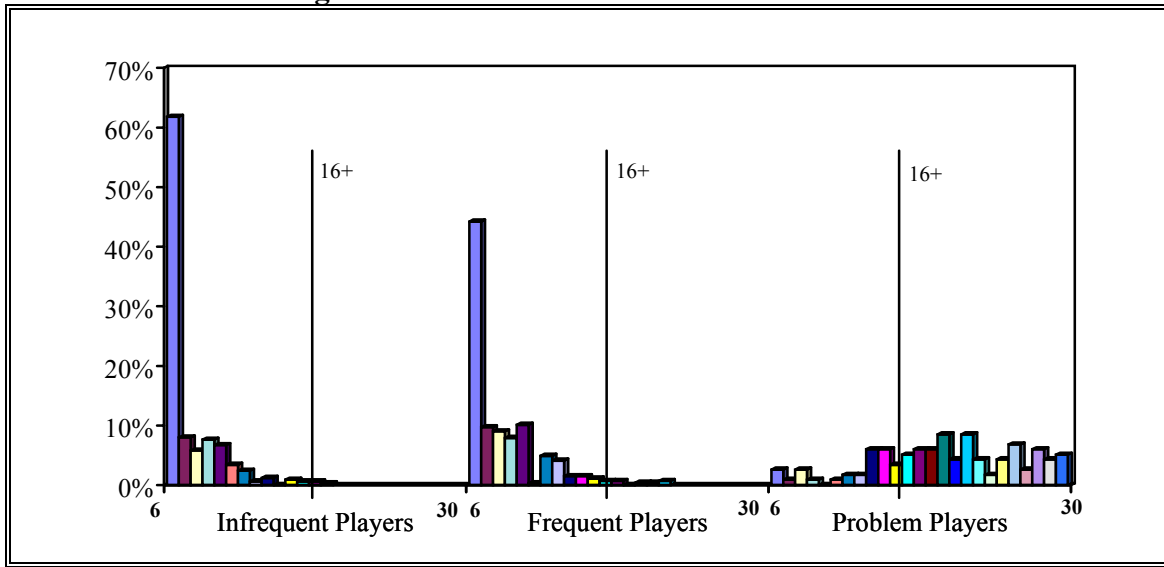
The multi-item attitude score was created by adding together each respondent's response for each of the above six items. Given that the six items are scaled from one to five, the range of the total score falls from a low of six to a high of thirty. Assigning a cut-off point at which to classify an individual as a Problem VL Gambler can be rather arbitrary. While a four and five on a five-point scale are understood by most to signal agreement with a particular item, the entire scale of a psychographic measure can be used to discriminate between segments. For example, selecting those who respond with a rating of three to a statement where 95% of respondent answered one or two may be a very effective way of identifying distinctive subsegments. (Given the nature of the six statements identified as a discriminator, the combined response score was labeled the "Tormented Scale.")

**Multi-Item Attitude Scores For All Regular VL Players
("Tormented Scale")**



The distribution of responses for each item was examined and an overall score of sixteen was adopted as the cut-off point. Those Regular Players who scored 16 or above comprise 15.3% of the sample (n=109). Some respondents who scored above fifteen were not classified as Problem Players, as they did not qualify on at least one of the other two independent measures. The distribution of responses for each of the player segments is presented below.

Segment Distribution On "Tormented" Scale



The mean score for the three Regular Player segments on the "Tormented Scale" are as follows:

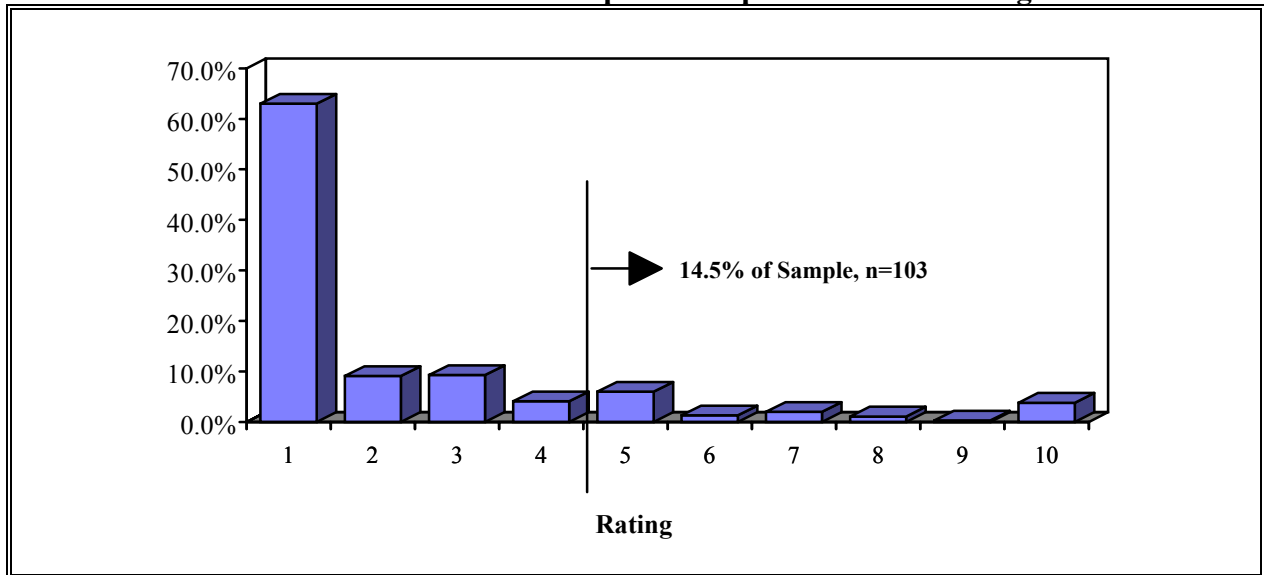
- ♦ Infrequent Players = 7.4;
- ♦ Frequent Players = 8.4;
- ♦ Problem Players = 20.3.

2. Reported Impact Of VL Gambling (10-point scale)

Respondents were nominated for membership in the Problem Player segment if they responded with a 5 or higher on a 1 to 10 scale for the following question:

In general, on a scale of 1 to 10 where 1 means your VL play is not at all a problem and 10 means your VL play is a serious problem, how would you rate your VL play right now?

Distribution for Scale of Reported Impact of VL Gambling



This question was asked towards the end of the survey after respondents had been able to consider the various aspects and consequences of their play, and after they had established a rapport with the interviewer. Again, there were some respondents (n=15) who rated the level of seriousness of their VL play at five or above, yet did not qualify on at least one of the other nominating criteria for problem VL gambling. Consequently, these adults are not included in the Problem Player segment.

3. Self Declared Problem

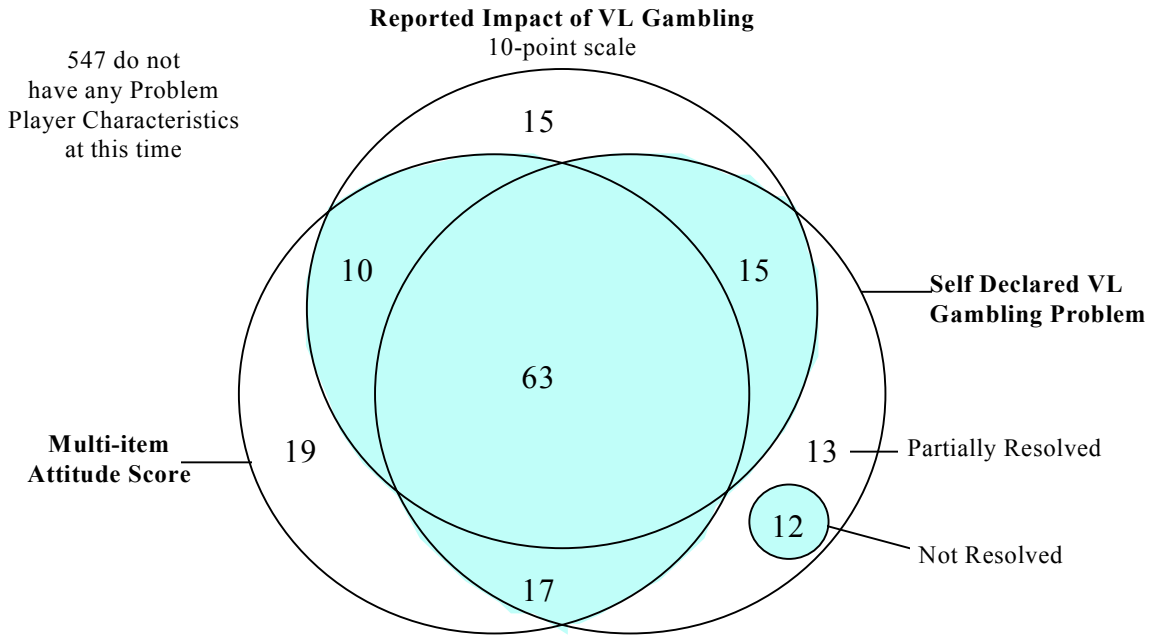
The second and third measures are both self-designated, based on scored questions in the survey. Respondents qualified to be nominated for Problem Player segment membership if they answered “Yes” to:

Have you ever felt you were spending more money or time playing VL games than you should? (Yes to more money, more time or both)

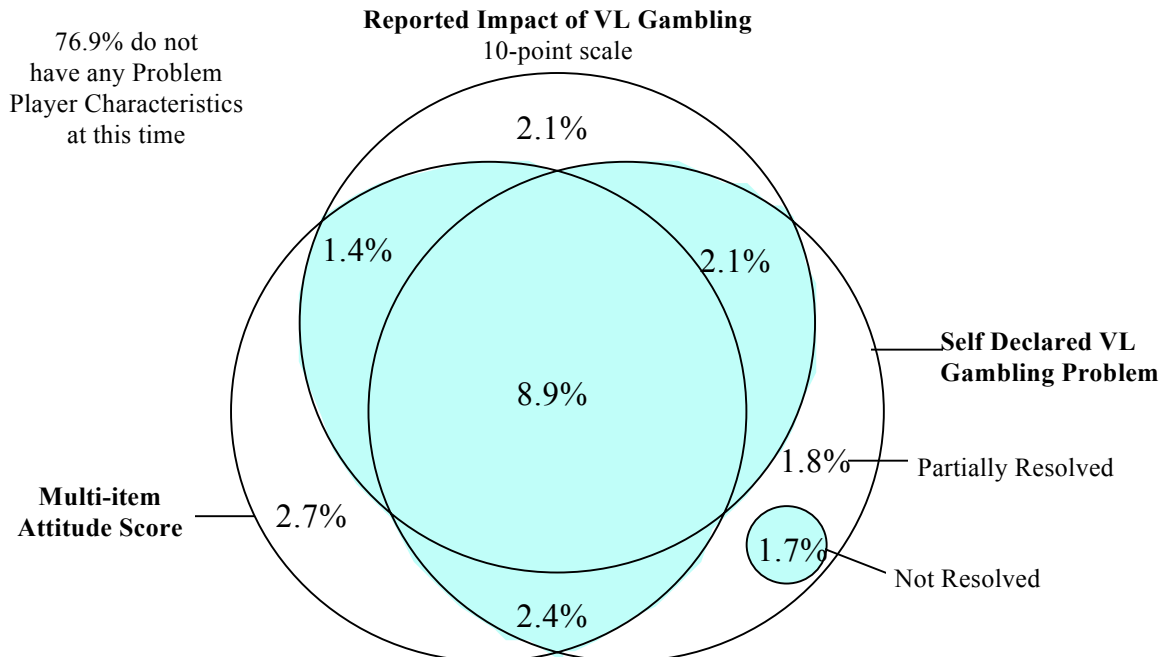
Have you dealt with this issue of your VL gaming or is it still a concern to you? (Yes to “resolved problem partially” or “still a problem”)

In the sample, 25% of respondents (n=177) respondents indicated they have had a problem with time or money playing VL games at some time in the past. Of these, 6% of the sample (n=44) reported they have only partially solved the problem, and 11% (n=76) said they still have a problem. Combined, those that said yes to both of these questions comprise 17% of the sample, or 126 respondents.

Criteria Used To Assign Respondents To Problem VL Player Category (Number of Respondents)



Criteria Used To Assign Respondents To Problem VL Player Category (% of Regular VL Players)



As noted, assignment to the Problem VL Player segment required a respondent to have been nominated on two of the three measures (Cronbach's Alpha = 0.842).

There were 105 Regular Players who qualified on at least 2 of the nominating criteria. There were also an additional twelve respondents who stated unequivocally that they currently have a problem with their VL gambling which has not yet been resolved. Although these players do not qualify on the other two measures, it was decided (for reasons previously stated) they should be included in the Problem Player segment.

The remainder of the sample was divided into two segments, based on their frequency of play: those who played three times per month or less, and those who played four times a month or more. Those who played less than four times a month were designated the **Infrequent Player** segment; those who played four or more times a month joined the **Frequent Player** segment.

	Infrequent Players	Frequent Players	Problem Players
Sample Size	327	267	117
% of Regular Players	46%	38%	16%
Average Times Played per Month	1.6	7.2	8.0

The Frequent Player segment meets the criterion of playing, on average, as frequently as Problem Players. Thus, the actual play levels between the two segments is the same, and it will be other factors, such as attitudes or play patterns that will differentiate the groups.

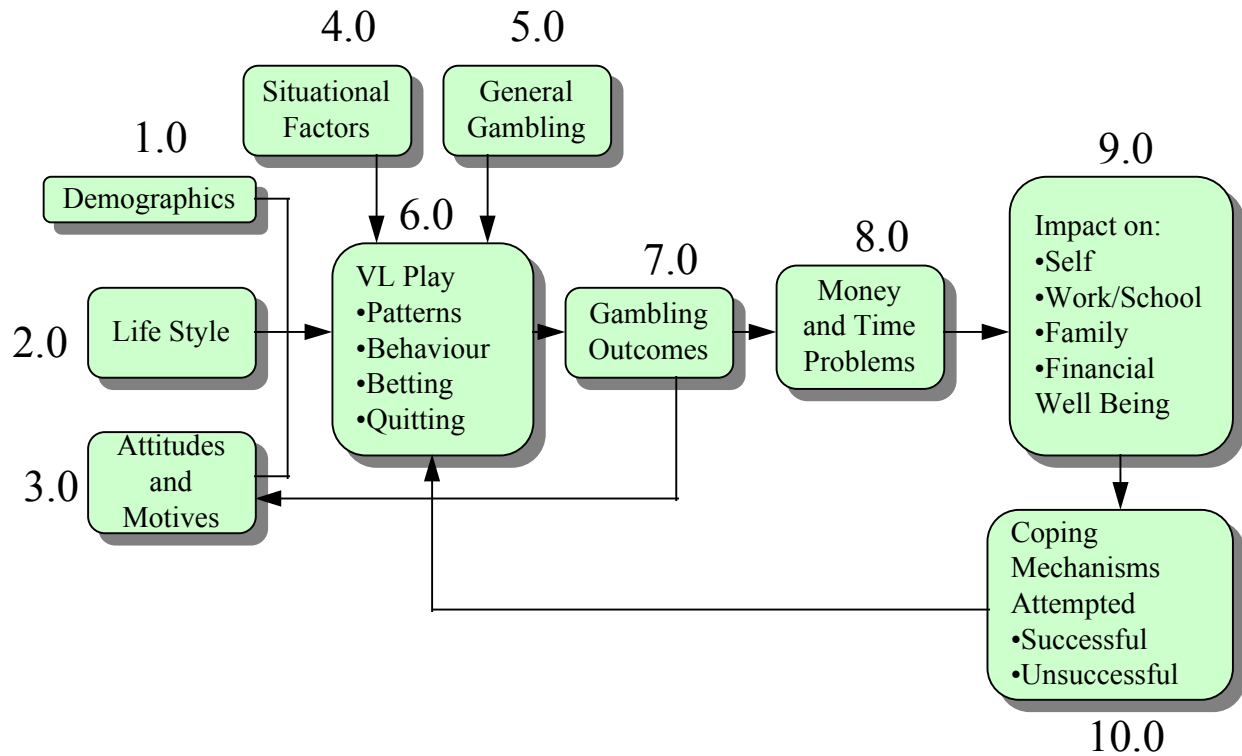
Analysis:

The assumption underlying the creation of the three Regular VL Player segments is that there are distinct differences among adults who regularly gamble on VLT's and are not currently experiencing problems with their play and those who are involved in problem VL gambling. Obviously, frequency of play is believed to be a contributing factor. However, while most Problem VL Gamblers play frequently (≈ 8 times per month on average), the majority of those who play frequently are not necessarily Problem VL Gamblers. Therefore, the analysis focuses primarily on profiling and contrasting the Frequent and Problem Player segments. The data tables, in Appendix D, present the means, medians and percentages for all three Regular VL Player segments. Differences significant at the 90% confidence level or greater are highlighted (See Appendix D for a discussion on how to interpret the tables). A fourth column has been added which presents any statistically significant differences in responses between the Frequent and Problem Player segments. This allows the reader to quickly identify which characteristics or behaviours differ significantly between the Frequent and Problem VL Gamblers, as well as the magnitude of the differences.

Due to the exploratory nature of the research, and the need to minimize Type 2 as well as Type 1 errors, a confidence level of 90% was considered reasonable. Mann-Whitney U tests of significance were used for testing medians. Z-tests (two-tailed unless otherwise specified) and Chi Square tests were conducted for all between group differences.

During the developmental phases of the study, a VL Player Behaviour Model was developed in order to facilitate the designing of the questionnaire and for use in hypotheses testing:

Model of VL Problem Play



The analyses (and the data tables in Appendix D) follow the model from left to right, with the numbers indicating the appropriate section in the report (e.g., 3.1: Demographics). The model starts with the underlying characteristics hypothesized to influence VL playing and potentially problem play, and moves through to an analysis of successful and unsuccessful coping mechanisms. As readers proceed through the report, they should develop an understanding of the factors that lead to problem play and the consequences of the problem for the VL gamblers themselves.

3.1 Demographics (Tables 3.1.1 - 3.1.3, Appendix D)

A comparison of demographic profiles, between *Regular VL Players* and the rest of the adult population, found that Regular Players tend to more often be male, are younger, are less educated and are more likely to be single. This corresponds with people who are more socially active outside the home, spend more time at bars where the machines are found, are less religious and, therefore, more likely to be tolerant of gambling. The majority are employed and, thus, have access to a pay cheque in order to support the activity. It is reasonable, therefore, that they would more likely be regular players of VL games.

However, these are not necessarily the demographic characteristics that lead to *problem VL play*. As mentioned earlier, the issue is how can an individual be a Regular VL Gambler, in particular, a frequent regular player, and not have problems? Comparing the **Problem Players** to the **Frequent Players** found that there is very little difference demographically between those who play frequently (Frequent Players) and Problem Players.

Problem Players are **less likely** than Frequent Players to fall into the following segments:

- ♦ age 19 - 24 years (10% of Problem Players versus 18% of Frequent Players);
- ♦ age 60 years or older (3% versus 8%);
- ♦ have household incomes of \$35,000 or more (35% versus 45%), in particular, between \$35,000 and \$45,000 (12% versus 19%) or over \$75,000 (4% versus 10%).

Problem Players are **more likely**, however, to include those who:

- ♦ are separated/divorced/widowed (15% versus 9%);
- ♦ are living in two adult, no children households (37% versus 28%);
- ♦ are disabled (6% versus 2%);
- ♦ have less than Grade 9 educations (9% versus 4%).

These demographic segments of Problem VL Gamblers are small and, therefore, have less impact on the overall profile of Problem Players. However, within these demographic segments, problems with VL play may be more prevalent. The sample size (400) for the general population survey is not large enough to profile these smaller segments for Problem Players (which would be expected to consist of three to five respondents in a sample of 400 adults). However, the Regular VL Players' sample can be used to determine the proportion of Problem Players within demographic segments of regular players.

The percentage of Problem Players, as defined in this study, is 16% of all regular players.

The following table lists those segments with statistically significant higher and lower incidences of Problem Players compared to video lottery players in general.

Figure 3.1
Regular VL Player Demographic Segments That Have
Significantly Higher or Lower Percentage of Problem Players

Segment	Percentage of Regular VL Players	Sample Size	Percentage of Segment Who Are Problem Players
All Regular VL Players	100%	711	16%
High Percentages:			
Less than Grade 9	6% *	41	24% **
Non-English Mother Tongue	5%	34	24%
50 - 59 year olds	13%	93	23%
Those living in two adult households with no children	28%	199	22%
Separated/Divorced/Widowed	11%	80	22%
Low Percentages:			
Have three children	6%	44	7%
Homemakers	6%	42	7%
Students	5%	38	8%
19 - 24 year olds	20%	139	9%
Household Income: > \$75,000	8%	57	9%
University Incomplete	6%	41	10%
60 years or older	14%	97	10%
Income: \$35,000 - \$45,000	18%	128	11%
Five+ person households	14%	79	11%

* 6% of Regular Players indicate they have less than Grade 9 education levels.

** 24% of those Regular Players who have less than Grade 9 education levels are identified as Problem VL Gamblers.

The results suggest that those Regular Players at greater risk of developing a problem with their VL gambling include those who have less than Grade 9 education levels, those who have a mother tongue other than English, those aged 50 to 59 years, those living in two-adult with no children households and those who are presently divorced/widowed or separated. It appears that these players may have the cultural influences, the time to spare and/or the financial resources to experience trouble with VL gambling.

At lower risk are Regular Players with three children in their households, homemakers, students, or those 19 to 24 years of age. Presumably, these people's lives are too filled with other activities (going to school, raising children), and they do not, as frequently, have the time or resources necessary to play as long or to spend as much as it requires to develop problems with video lottery gambling. In fact, both homemakers (69%) and students (55%) are more inclined than other Regular VL Players to be Infrequent Regular VL Gamblers. Of particular interest are the contrasts between the 19 to 24 year olds, with 9% problem play, and the 50 to 59 year olds,

with a level of 23% for problem play. Lifestyle and additional differences between these segments may be the factors that cause the discrepancy. The younger people may be in establishments where VLT's are located, but have too many other interests to distract them from sitting in front of the machines for extended periods of time. However, those in the older segment (50 - 59 years) may be less active and more inclined to seek out this form of entertainment. Furthermore, these older adults (50 years +) have greater financial resources to spend on the games (e.g., having "paid off the house" and having fewer dependents to support while in a higher income earning category). A key question is whether more of the younger players will become Problem Players as they age, or will the present socialization process reduce this susceptibility to having problems with VL gambling?

The authors of this report have heard non-players comment several times that Problem VL Gamblers must be unemployed in order to spend so much time playing VLT's. However, the data do not support this hypothesis. In fact, the three Regular VL Player segments are the same in terms of having a full-time job (60% - 61%), being employed part-time (12% - 15%) and being unemployed (5% - 7%).

The results suggest that, despite the significantly higher incidence of problem play within small distinct segments of the Regular VL Player base in Nova Scotia, those adults who are characterized as Problem VL Gamblers, for the most part, will have a similar profile to Regular VL Players in general. For example, there is no difference in the proportion of men or women who are Regular VL Players and who subsequently develop problems with their VL gambling (17% versus 15%). However, since males comprise 62% of all those adults who play VLT's on a regular basis, men will also account for the majority of Problem VL Gamblers in Nova Scotia (65%).

Intervention and support strategies for Problem VL Gamblers in Nova Scotia will have to accommodate individuals with a diverse range of backgrounds and characteristics. However, at this time, those adults most likely to require problem gambling support services in the province will largely be comprised of those with the following demographics characteristics:

- ♦ males (65%);
- ♦ from 25 to 59 years of age (86%);
- ♦ approximately half are married (53%), with one-third single/never married (32%) and 15% separated/divorced/widowed;
- ♦ majority do not have children living in their households (65%);
- ♦ predominately having high school educations or less (59%);
- ♦ majority are employed full-time (61%), primarily in Blue Collar occupations (42%);
- ♦ annual household incomes tend to fall under \$45,000 (61%), and the majority will have two people contributing to household income (63%);
- ♦ largely Anglophones (English mother tongue) (93%);
- ♦ live in urban areas of Nova Scotia (68%).

3.2 Lifestyle (Table 3.2.1 - 3.2.2, Appendix D)

Two primary aspects of lifestyle were included in the survey:

- 1) how much time players spend on work, social and recreational activities each week;
- 2) frequency of participation in specific social and recreational activities each month.

The second measure focused on how often respondents participate in a particular activity each month, rather than the amount of time devoted to the activity. This is due to the fact that many of these activities are not, typically, undertaken on a weekly basis. In addition, the amount of time spent on the particular activity may vary widely each month and, thus, it is too difficult for respondents to provide reliable estimates of the time they typically spend on these various activities each month.

3.2.1 Time Spent Weekly On Work, Social & Recreational Activities (Table 3.2.1)

It was hypothesized that, compared to Frequent Players, Problem Players would spend more time playing VL games and, thus, less time on other, potentially less problematic, social and recreational activities. This comparison was undertaken primarily for the following purposes:

- ♦ to provide insight into the distinctive nature of the Problem Player;
- ♦ to help explain why certain individuals are involved in problem video lottery gambling;
- ♦ to potentially identify other activities that might be reasonable substitutes for VL play (this is subject to interpretation).

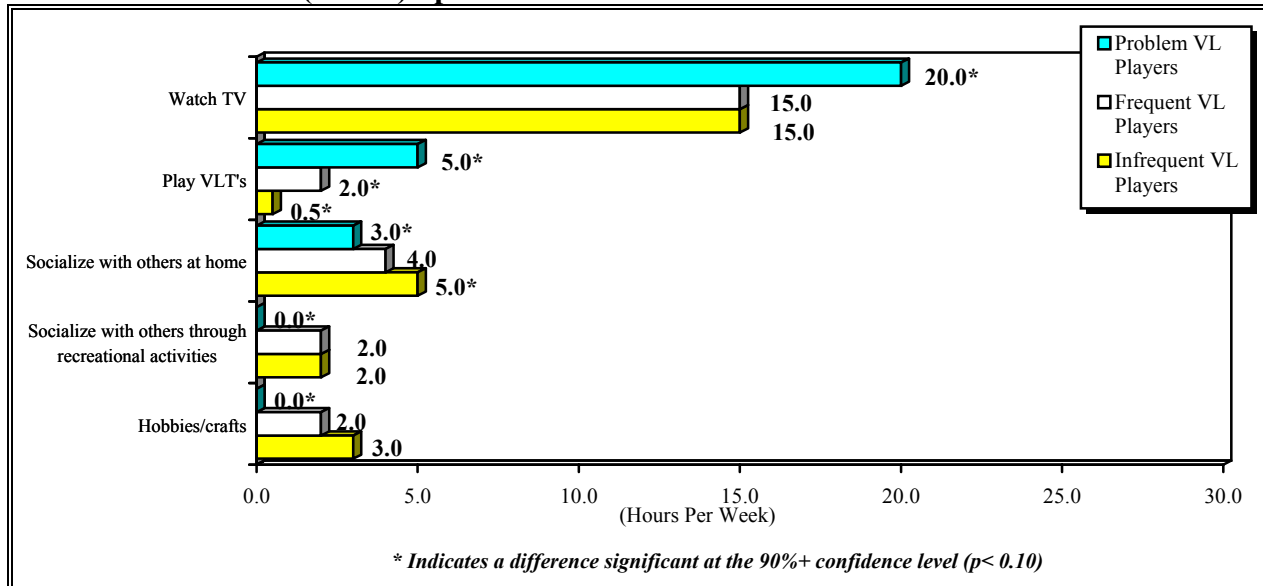
There are no significant differences among any of the Regular VL Player segments for the following activities undertaken in a typical week:

- ♦ work at their jobs (≈ 40 hours per week);
- ♦ relaxing at home (≈ 10 hours per week);
- ♦ doing household chores (≈ 7 hours per week);
- ♦ socializing at the homes of friends or family (≈ 4 hours per week);
- ♦ socializing with friends or family at bars (≈ 2 hours per week);
- ♦ playing games (not for money) (≈ 1 hour per week).*

On average, Problem VL Gamblers are no different from other Regular VL Players in terms of their typical weekly involvement in these activities. However, there are distinct differences noted for some of the other activities measured.

* *It should be noted that, typically, Frequent VL Players spend two hours per week playing non-gambling games versus only one hour for Problem VL Gamblers. While this difference is only significant at the 85% confidence level ($p=0.15$), in light of other behavioural differences, this result may be of practical significance.*

Graph 3.2.1
Median Time (Hours) Spent On Social & Recreational Activities Each Week



As predicted, even though the frequency of play for VL games is no different between the two segments (7.2 times a month for Frequent Players and 8.0 times a month for Problem Players), the median time per week spent playing VL games is 150% higher for Problem Players. The Frequent Players' median time is two hours per week, while the median for the Problem Players is five hours per week, or an extra twelve hours per month spent playing video lottery games. The median time spent by Infrequent Regular VL Players is only thirty minutes per week or approximately two hours per month.

It is apparent that Problem Players spend more time playing the games each time they play and that helping them to control the amount of time spent in front of the machine may be an important part of reducing their problem with video lottery gambling.

It was expected that problematic play of VLT's would reduce time spent on other activities, and this appears to be true. However, time spent watching television is significantly higher, with the median for Problem Players ~33% higher than for those in the other player segments (20 hours a week rather than 15 hours a week). The median for Problem Players is twice that for those adults who do not play video lottery on a regular basis (20 hours versus 10 hours). This suggests that Problem VL Gamblers have a greater propensity to watch television shows. There is no difference in the frequency of video rentals among regular players, suggesting that Problem Players really prefer to watch television programs. It is possible that were they not playing VL, they would be spending even more of their time watching television and, therefore, the discrepancy in time spent watching television each week among the Frequent and Infrequent segments and Problem Players would be even greater.

Problem VL Gamblers, typically, spend less time on activities that require personal initiative, social interaction and skill development. The median time spent socializing with others by playing sports, involvement with volunteer organizations and other recreational activities is two hours lower for Problem Players than for Frequent Players, as is involvement with hobbies,

crafts and special interests. The median weekly time spent with friends at home and playing games not for money are both one hour lower. Conversely, the Frequent Players spend more time socializing, playing sports, participating in hobbies and socializing at home.

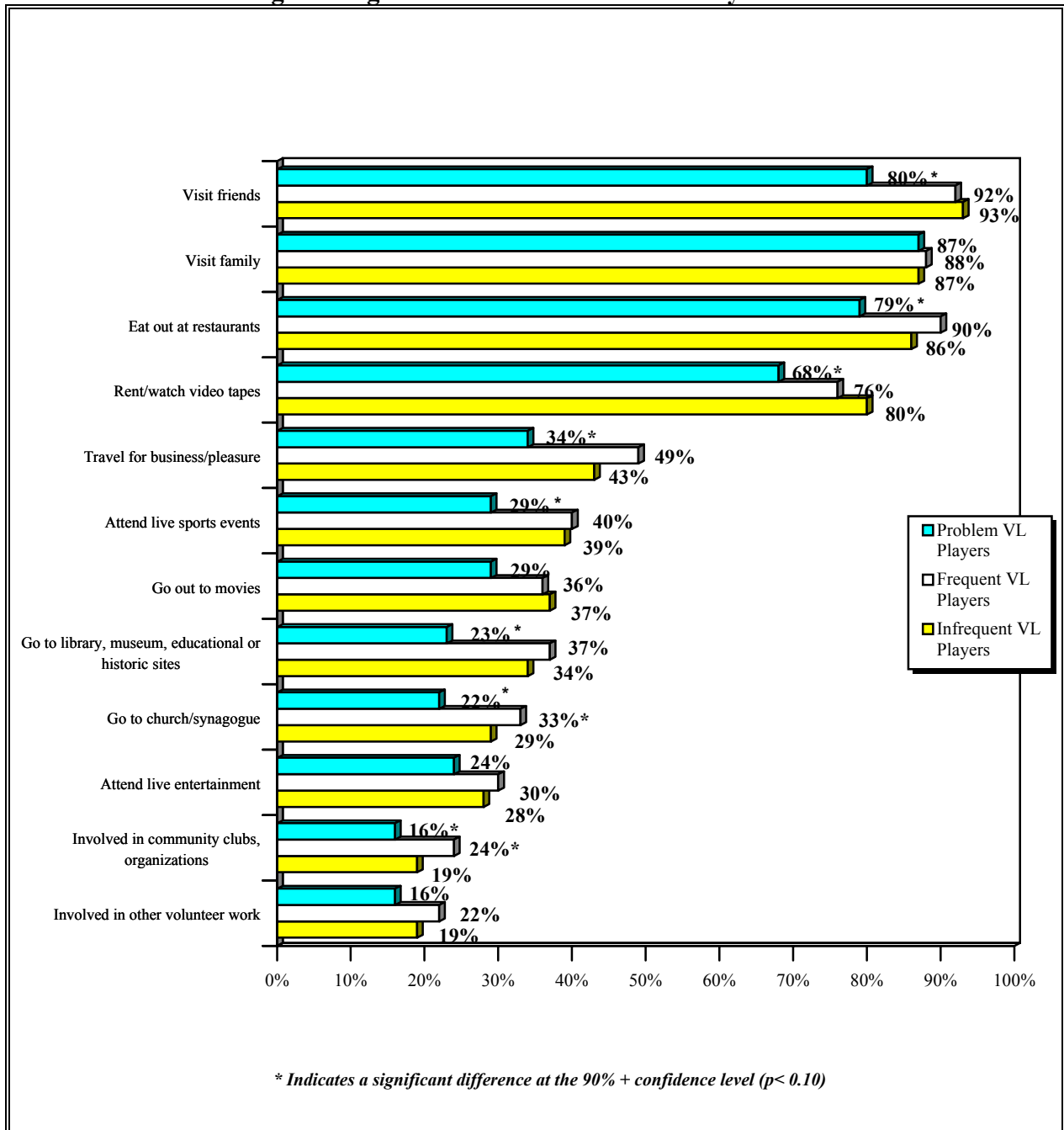
The direction of causality is difficult to determine. Given the Problem Players' greater interest in watching television, it may be that they were always more passive, less social, more attracted to visually and emotionally stimulating entertainment and were always less involved in the more pro-active social and recreational activities. If this hypothesis is true, then efforts to get Problem VL Players involved in more pro-active activities may not be effective, no matter how socially acceptable these other activities might be. A potential solution may be to provide alternative passive entertainment options (e.g., the satellite channels) and encourage the Problem Players to substitute these types of behaviours for VL play.

To test this hypothesis, a preference score can be developed for the various alternative activities measured and Problem Gamblers could be directed toward those activities that have the highest preference within this group of players.

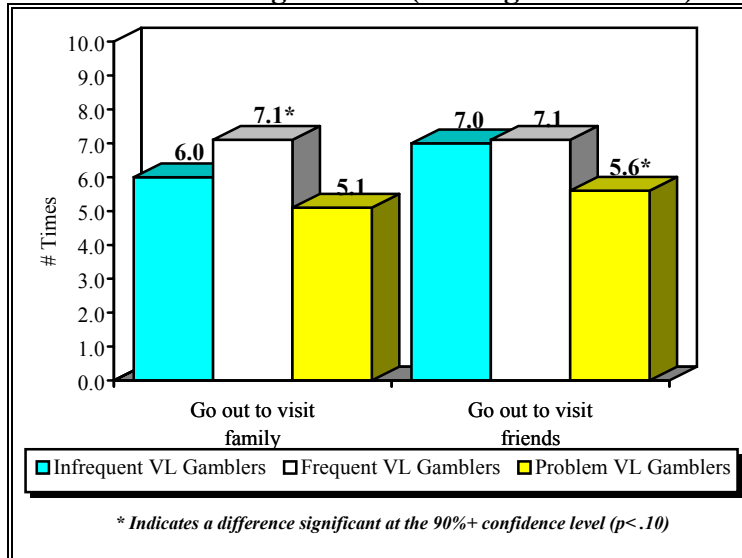
Given that the median times spent working at the job, working at home, and doing household chores are identical for all three player segments, it appears that it is other recreational activities that Problem Players sacrifice in order to play VL games.

3.2.2 Participation In Activities On A Monthly Basis (Table 3.2.2)

Graph 3.2.2a
Percentage Of Segment Involved In Each Activity Each Month



Graph 3.2.2b
Frequency of Participation With Friends & Family
In An Average Month (Average # of Times)



Consistent with Problem VL Gamblers' weekly involvement with work, social and recreational pursuits, on average, **those regular players who are experiencing problems with their VL gambling have less involvement with friends and family members during the course of a month, as compared to other regular VL gamblers.**

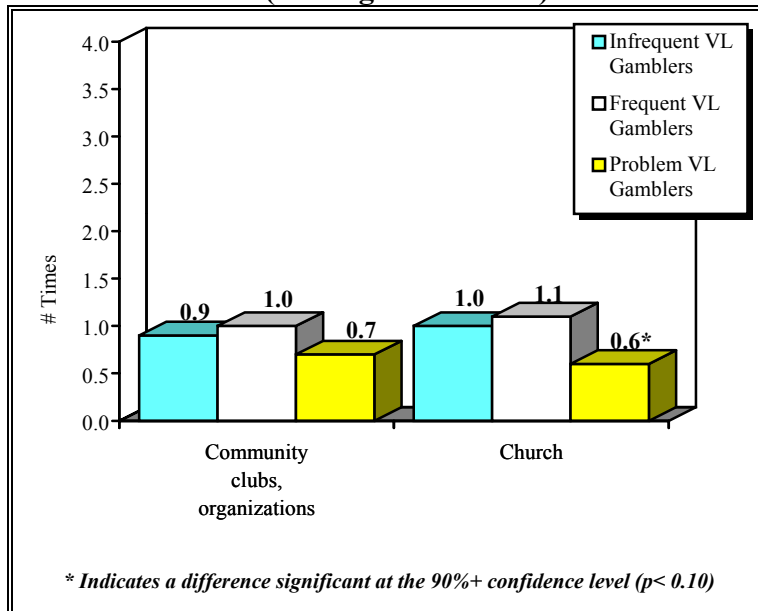
While they are just as likely each month to be visiting with family outside their homes (87%), on average, Problem VL Gamblers tend to do so less often than other regular VL players (5.1 versus 7.1 times per month) and, typically,

spend less time visiting when they do go (≈2 hours versus 3 - 5 hours per week).

Comparatively, Problem VL Gamblers are also less inclined than other regular VL gamblers to visit friends (80% versus ≈92%) and, typically, go out visiting friends fewer times each month (5.6 versus 7.1 times/month). It is noteworthy that despite a slightly greater overall tendency for Problem Players to be visiting family (87%) as compared to friends (80%) each month, they generally visit more often with friends during the course of an average month (5.6 versus 5.1 times per month). In contrast, Frequent VL Players are equally likely to visit with family or friends (7.1 times per month).

Greater interaction with friends and family may offer some Problem Players alternative activities to replace VL gambling, or assist in reducing the amount of time devoted to play of the machines. In particular, since the majority of Problem VL Gamblers are involved with friends and family each month, yet typically spend less time on these events, an opportunity exists to extend their involvement/participation in social situations with friends and family. The support of friends and family will be critical in including the Problem VL Gambler in social events they may have previously avoided or cut short.

Graph 3.2.2c
Frequency of Participation With Church & Community Clubs, Organizations In An Average Month (Average # of Times)



Compared to other regular VL players, fewer Problem VL Gamblers are involved in community clubs or organizations (16% versus 24%) or a church or religious organization (22% versus 33%). Encouraging involvement in these community based activities may offer limited potential for the majority of Problem VL Gamblers, however, for a distinct segment, opportunity exists to use these activities to support their efforts to control their play.

It will be recalled from Section 2.4 that VL Gamblers, in general, are less likely to be going to church or a synagogue

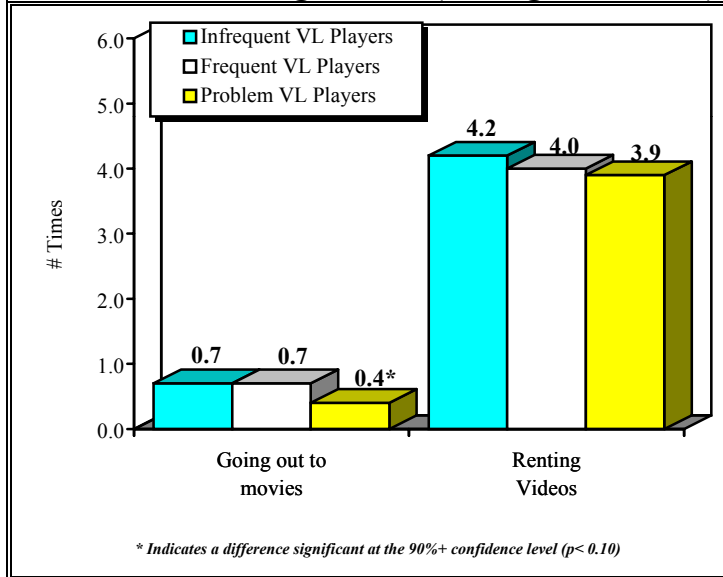
than those who have never played VL games (29% versus 55%). Problem VL Players are even less likely than other regular VL players to be involved in organized religion and, on average, are in a church or synagogue approximately once every two months, as opposed to once a month for other regular VL gamblers (0.6 versus ≈ 1.1 times/month).

While the majority of Problem VL Gamblers (78%) do not typically attend church each month, 22% of all those currently experiencing difficulty with their VL play attend church at least once a month and are fairly evenly divided between sporadic once to twice a month attendance (10%) and regular weekly attendance (12%). For these Problem VL Gamblers, regular contact with the church or other religious affiliations may offer support either directly, or indirectly, through family or other household member involvement. Currently, approximately 2% of Problem VL Gamblers report they have sought help for their play through a church or religious group. Interestingly, none of the 26 Problem VL Gamblers in the study who regularly attend church stated they have personally sought assistance for their problem VL play through a religious affiliation. In the present study, it appears that it is largely other family members or friends who go to this source for help or information. In fact, only 3% of all those seeking assistance from churches or religious groups on VL gambling in Nova Scotia are Regular VL Players themselves.

The Problem VL Gamblers who are accessing religious groups/organizations for help appear, for the most part, to be those who are lapsed or non-regular church attendees, as opposed to those who currently attend regular religious functions. It may be that there is such a significant social stigma attached to problem VL gambling that going to a familiar religious leader or religious group for help is difficult for Problem Players. It may also be the Problem VL Gambler does not perceive religious organizations as being able to assist them with their “problem.” Given the

necessity of the “church” to be largely responding to the family (or friends) of Problem VL Gamblers, it may be that the actual players themselves avoid using this support source (possibly due to embarrassment, shame or guilt).

Graph 3.2.2d
Frequency of Going Out To Movies Or Renting Videos In An Average Month (Average # of Times)



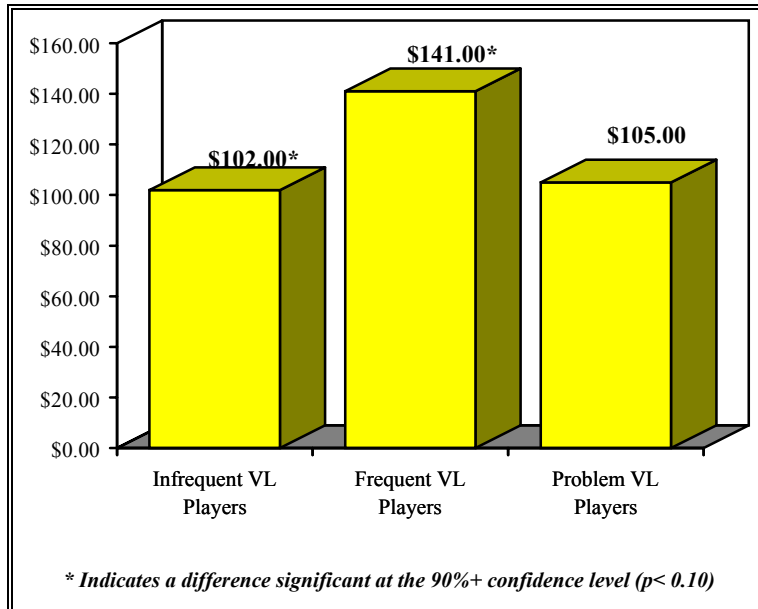
As noted previously, Problem VL Gamblers are heavy television viewers, as compared to any other player segments in the population. Although, on average, they rent just as many movie videos each month (3.9 versus 4.0 video rentals/month), significantly fewer Problem VL Gamblers (68%) watch video tapes during a typical month, as compared to Infrequent (80%) or Frequent VL Gamblers (76%). Conversely, a similar proportion of all regular VL gamblers go out to watch movies at a cinema (≈35%), however, Problem Players tend to do so less frequently each month than those in the non-problem player segments (0.4 versus 0.7 times per month). **It would be**

reasonable to assume that the response of Problem VL Gamblers towards “videos or movies” would be higher given their propensity towards television viewing. However, it appears that accessibility and/or cost may be exerting influence such that Problem VL Gamblers may not be sufficiently motivated to go out and/or spend money when they can watch TV with no additional cost or effort. It may also be that the additional funds are allocated (or consumed) by VL gambling.

In terms of other entertainment options, **Problem VL Gamblers are less inclined to attend live sporting events (29% versus ≈40%), go to library, museums, educational or historic sites (23% versus ≈37%), or travel for either business or pleasure (34% versus ≈49%).** Again, for those Problem Players who do take part in these activities, it may be particularly effective to assist them in redirecting more of their leisure time towards the pursuit of these interests. For the most part, these activities are inexpensive (library, museum) or there are cost-effective alternatives available (watching hockey at local arena, watching a ball game on the local diamond). Assisting Problem VL Gamblers in substituting even some of their typical VL gambling sessions with another activity of interest (e.g., going to a weekly meeting or watching the Junior A ball game every Friday evening instead of playing VLT’s) may interrupt the playing pattern without leaving the Problem Player with time on his/her hands (that typically was filled through VL gambling).

Problem VL Gamblers are also less inclined to eat out at restaurants each month (79% versus ≈90%) and, on average, eat out approximately three times per month, as compared to approximately four times per month for Frequent VL Gamblers. Presumably, their high expenditure on VL gambling contributes to part of this discrepancy.

Graph 3.2.2e
Average Amount Of Monthly Expenditure
On Entertainment Activities



On average, Problem VL Gamblers spend \$105.00 per month on entertainment expenses (excluding gambling), with approximately half spending \$55.00 or less per month. Their entertainment expenditures are almost identical to that noted for Infrequent Players who generally are not out socializing as often as other Regular Players. The Frequent VL Players tend to have the highest monthly entertainment budgets which is consistent with their greater tendency to be involved in other social and entertainment activities.

For some VL Problem Gamblers, it may be possible to develop a “personal fund” whereby the

average amount they usually spend on VLT’s is deposited into a jar, account, or some other fund, each time they deliberately skip a planned VLT expenditure. These funds can then be used to finance other entertainment options (as opposed to bills or other household/personal expenses). Quite often Problem VL Gamblers are playing in the hopes of paying off debts or bills and may use this rationale to justify their involvement in the gambling activity. It is not possible to apply this same argument to other, non-gambling based entertainment activities (i.e., going out to dinner). Thus, replacing the gambling with another non-gambling entertainment option will be difficult for the player to rationalize or fund. “Low cost” or “no cost” alternatives are ideal such as visits with friends, family; non-gambling games for fun; walking/hiking; involvement/viewing/participating in amateur sporting events; video games; movie rentals). However, these activities may not be attractive or reasonable alternatives for some Problem VL Gamblers and may be only partially effective in offsetting the “urge” to gamble on VLT’s. Demonstrating to these Problem VL Gamblers the financial return from reducing VL play and specifically allocating a proportion of this “recovered ‘or’ found money” to another non-gambling based entertainment option such as going out to dinner or going out to the cinema once a week may emphasize a personal benefit to the player and offset the loss of an entertainment option many players may experience when trying to reduce or stop playing VLT’s.

In cases where high levels of debt have been accrued, it may be reasonable and necessary to redirect the funds towards a repayment strategy. However, it must be kept in mind that these adults were spending beyond their capability to fund the activity and, thus, the actual amount available to “pay off debts” will be substantially lower than their VL expenditures. Furthermore, these adults devote large blocks of time to VL gambling. Replacing VL gambling with a long-term debt repayment plan may be difficult, if not impossible, to sustain. Balancing a manageable debt repayment schedule and budgeting skills with alternative leisure/entertainment/social

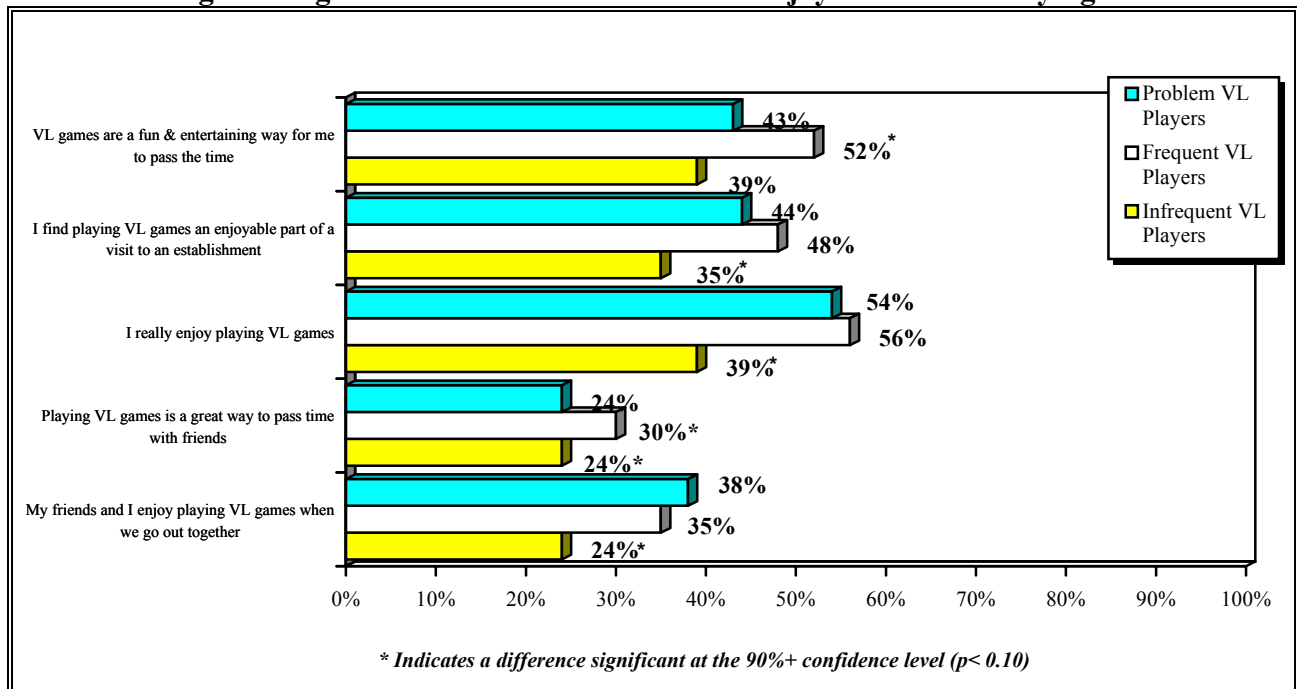
activities, to fill the time previously spent gambling, may lead to better outcomes for some Problem VL Gamblers. It may also minimize the risk of relapses as, typically, lifestyle changes take time to occur.

3.3 Attitudes & Motives Towards VL Gaming (Table 3.3, Appendix D)

Attitudes were measured using a five-point analog scale of strongly disagree to strongly agree. The twenty-one (21) attitude statements were grouped using principal component analysis (SYSTAT) into five factors and an independent statement. The statements in each factor were then ranked by the magnitude of the average difference between the Problem and Frequent players for presentation in the data tables and the graphs in this section.

3.3.1 Enjoyment From Playing

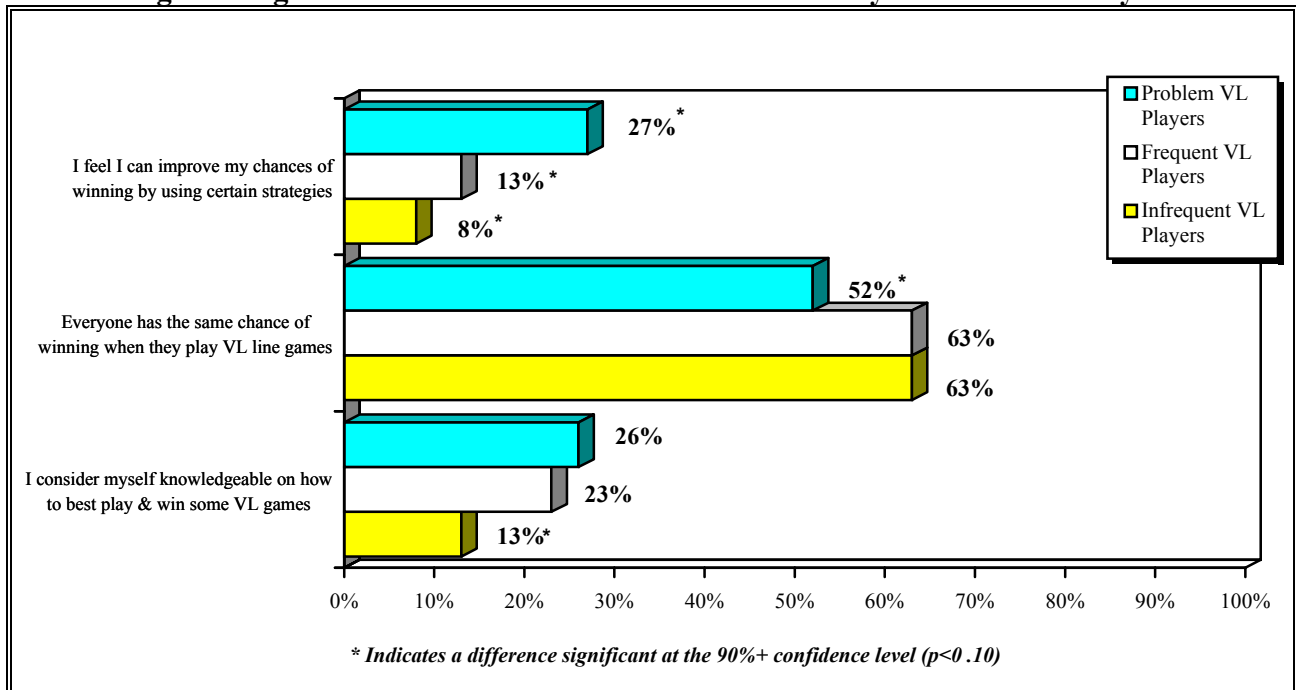
Graph 3.3.1a
Segment Agreement To Statements About Enjoyment From Playing



Problem Players and Frequent Players both feel that VL games are a form of entertainment (24% to 56% agreement for the five statements in this factor). Aside from the fact that Frequent Players are significantly more likely to indicate “VL games are a fun and entertaining way for (them) to pass the time,” the attraction of the games and the enjoyment derived from playing is similar for both segments. This suggests it is other attitudinal and/or motivational factors that may be causing the Problem Players to be in their current situation with video lottery gambling. It is not surprising that those Regular Players who have the lowest play levels each month (Infrequent Players) also have a lower incidence of those who derive enjoyment from playing.

3.3.2 Ability To Influence Play

Graph 3.3.2
Segment Agreement To Statements About Their Ability To Influence Play



Problem Players are more likely to feel they have the ability to influence the outcome of the game (27% versus 13%) and are less likely to agree that everyone has the same chance of winning (52% versus 63%). When asked whether the chances of winning depend on specific factors, both groups felt the odds of winning could be influenced by how recently the machine had “won” or “paid out” (60% to 57%), the size of the bonus (46% to 47%), and effective use of the stop button (44% to 39%). Therefore, belief in control and/or ability to influence winning is common for both segments. However, the **Problem Players believe many more factors could influence the odds, including the location they play in (43% versus 22%), the type of game (i.e., Swinging Bells, Aces Fever) (36% versus 18%), specific machines win more often (39% versus 23%), the make of the machine (18% versus 10%), the time of day (36% versus 16%), the day of the week (32% versus 18%), the size of the bet (52% versus 35%) and the skill of the player (22% versus 15%).**

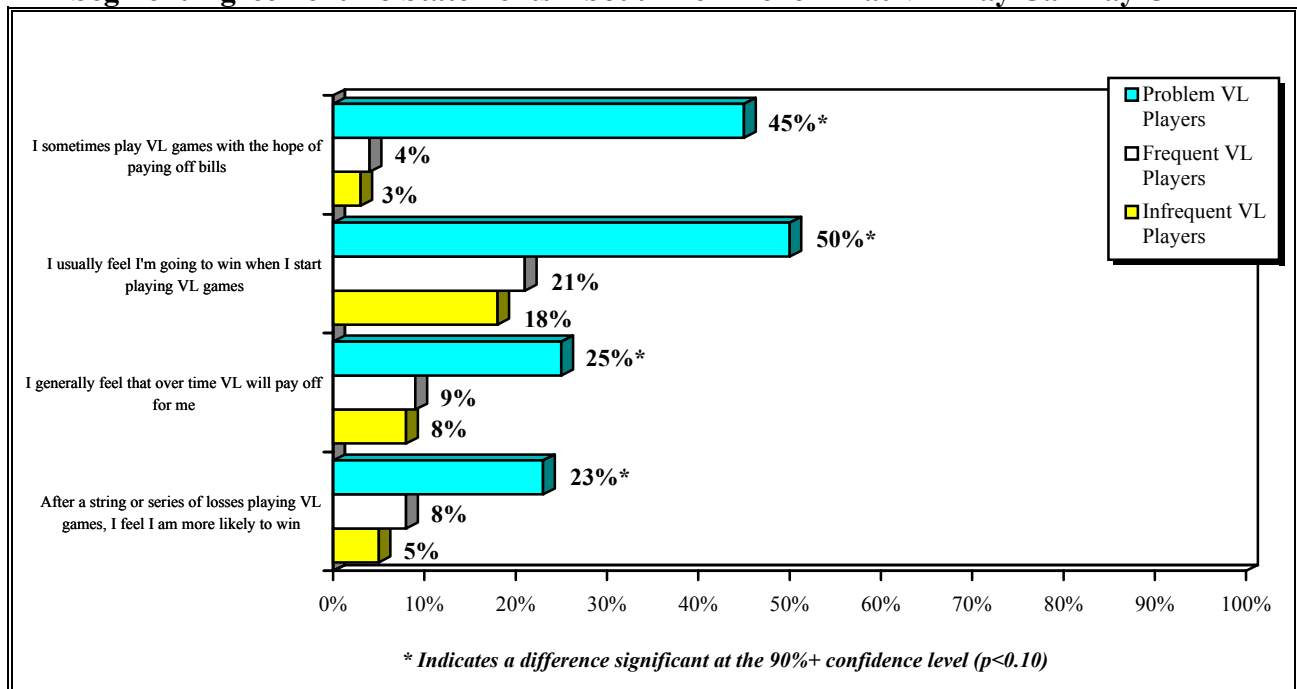
These beliefs appear to be contributing to problem VL gambling. If Problem VL Gamblers feel they can influence the odds of winning by the selection of machines or time of day they play, they will continue to play with the belief they can beat the odds in the long run. In times of trouble or when they are short of cash, they can win to feel better or they can win the needed cash. Manufacturers add stop buttons, bonuses and other features which certainly make video lottery more interactive and add to the enjoyment of the game. However, when these features provide players with illusionary control, or the false impression they are able to increase or influence their likelihood of winning, then the actual features themselves may be contributing and perpetuating problem VL gambling. It should be noted that elimination of these features

would certainly not solve the problem, as many of the factors that players feel influence the odds of winning have nothing to do with the specific features of the game itself.

Again, part of the solution appears to be creating within the players an understanding and acceptance of their true ability to influence the odds. This will not be easy to do, as most players (whether Infrequent, Frequent or Problem) firmly believe the odds of winning can be influenced and will simply disbelieve or disregard any statement to the contrary, no matter how authoritative the source. This suggests that research will be necessary on how to best communicate these points to players, particularly Problem Players, in a manner that is effective in changing these beliefs.

3.3.3 Expected Returns From VL Play

Graph 3.3.3
Segment Agreement To Statements About Their Belief That VL Play Can Pay Off

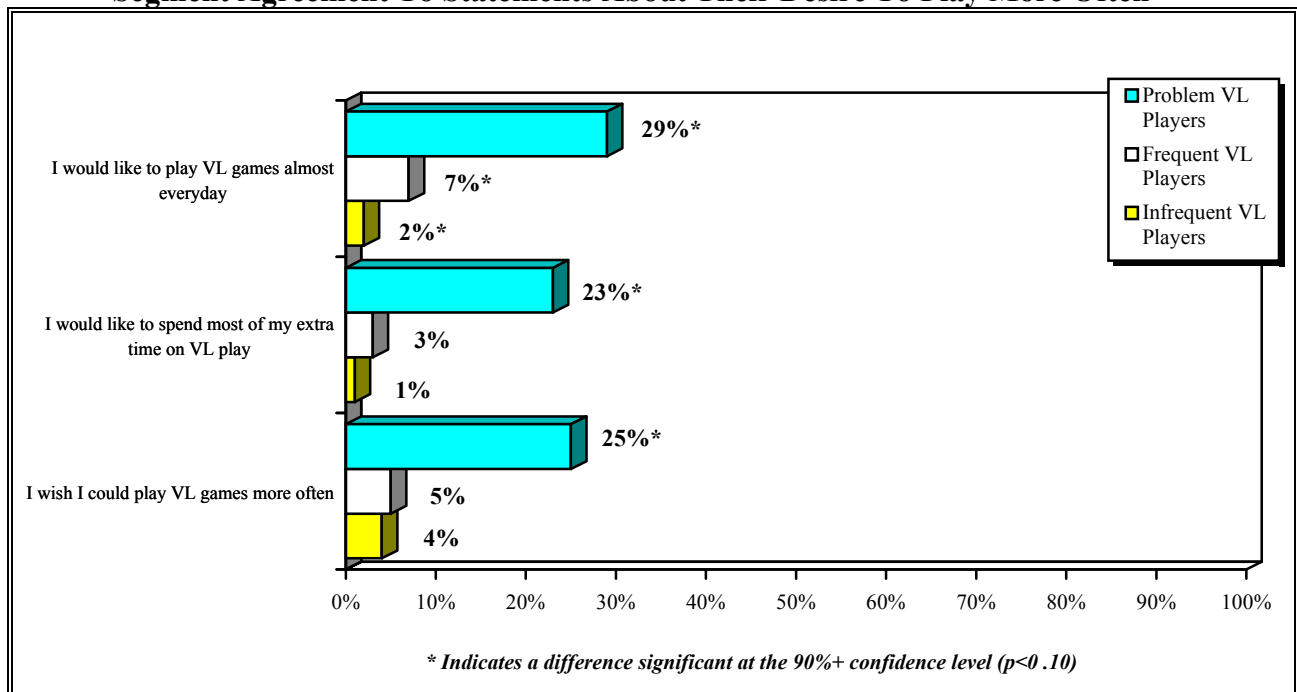


Resulting from their belief that they can influence the odds of winning is the belief that video lottery gambling can result in a player “coming out ahead.” Fully, 50% of Problem Players agree that they feel they are going to win when they start playing VL games compared to only 21% of Frequent Players. One-quarter feel that, over time, VL will pay off for them compared to only 9% of Frequent Players. However, **one of the largest contributors to problem play may be the belief that after a string of losses, they feel they are more likely to win (23% compared to 8%).** Acting on this belief will cause players to continue to play, particularly after they have lost, in most cases creating further losses (chasing their losses).

Tragically, these beliefs are associated with the **45% of Problem Players who will sometimes play VL games with the hope of paying off bills** (compared to 4% of Frequent Players).

3.3.4 Desire To Play More Often

Graph 3.3.4
Segment Agreement To Statements About Their Desire To Play More Often

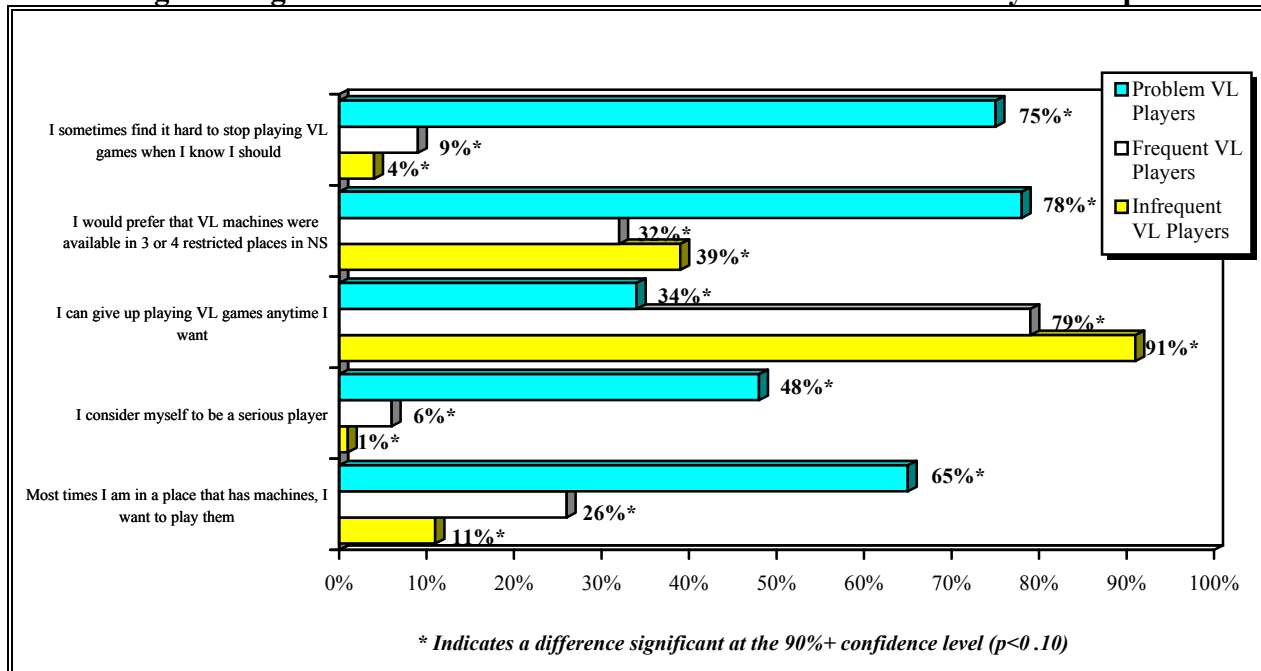


Few Frequent Players have a desire to play video lottery games more often than they are already playing. Comparatively, **more Problem Players say they would play almost every day** (29% versus 7%), **would spend most of their extra time on VL play** (23% versus 3%) and **wish they could play more often** (25% versus 5%).

This suggests that, for many Problem Players, there is an on-going danger that they could play even more often than they currently do and that they need control mechanisms in order to keep the desire in check. It also suggests that at least one-quarter or more of all Problem Players may be, or believe that they are, trying to exert some control on their desire to play, insofar as they are not playing as often as they would like.

3.3.5 Perceived Ability To Stop (Control)

Graph 3.3.5
Segment Agreement To Statements About Their Perceived Ability To Stop



Problem Players are much less likely to see themselves as being able to stop playing. Only 34% feel they can stop any time they want to, compared to 79% of Frequent Players. Likewise, 75% indicate they sometimes find it hard to stop playing, compared to only 9% of Frequent Players. **Considering themselves as “serious players” (48% versus 6%) and having a strong desire to play when in a location that has the machines (65% versus 26%) are also associated with an inability to control their play.**

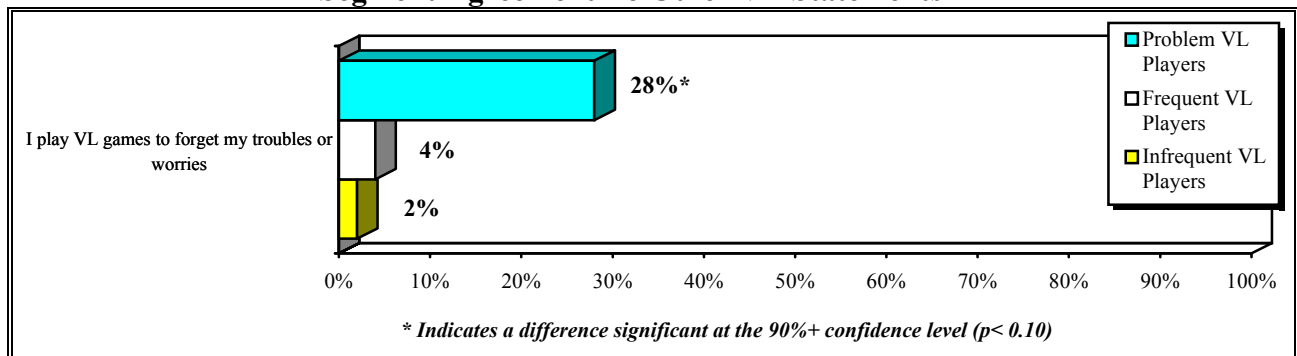
By definition, the Frequent Players and the Problem Players play the games just as often, **but the main problem for Problem Players appears to be an inability to stop once they have begun.** This is most likely fueled, in part, by their beliefs surrounding the odds of winning which many feel improve after a string of losses.

One possible solution to help control play that is strongly supported by Problem Players (78%) and, to a much lesser extent, by Frequent Players (32%) is to restrict the machines to three or four locations within Nova Scotia. This illustrates strong desire for control of their play by those who recognize they have a problem. Although the majority of regular players in Nova Scotia are not strongly supportive of this concept (only 43% of all Regular VL Players indicate some level of agreement), such a move may have substantial impact for an overwhelming proportion of Problem Players in the province. What is unclear, however, is whether the creation of a few designated VL gambling locations would actually reduce the VL gambling of Problem Players or, instead, tend to have a greater influence on reducing social play of the games. It may be that only those most motivated to play the machines (i.e., Problem VL Gamblers) would actively seek out play at a designated or restricted VLT location. The social, non-problematic VL gamblers who typically play the machines in addition to other social

activities on site may be less inclined to go to an exclusive VLT location. Thus, for these “social players” once VLT games are “out-of-sight” (i.e., no longer convenient to play), they are also “out-of-mind.”

3.3.6 Other Attitudinal & Motivational Factors

Graph 3.3.6
Segment Agreement To Other VL Statements



One of the situations that players report as triggering over-expenditure on VLT's is when they play to escape from troubles at home. Problem Players more often play VL games to forget their troubles and worries (28% versus 4%) and, thus, find themselves in a situation that may lead to overspending. It may be that Regular VL Gamblers are more vulnerable to problem play when they are experiencing other problems in their lives, as VL gambling allows them to “tune out” their worries and escape from their problems while they are playing the games. It may offer a temporary respite from life stresses. However, VL gambling itself may be contributing to other problems in their lives, thus, continued escape through VL gambling becomes a “vicious circle” the Problem Player cannot break.

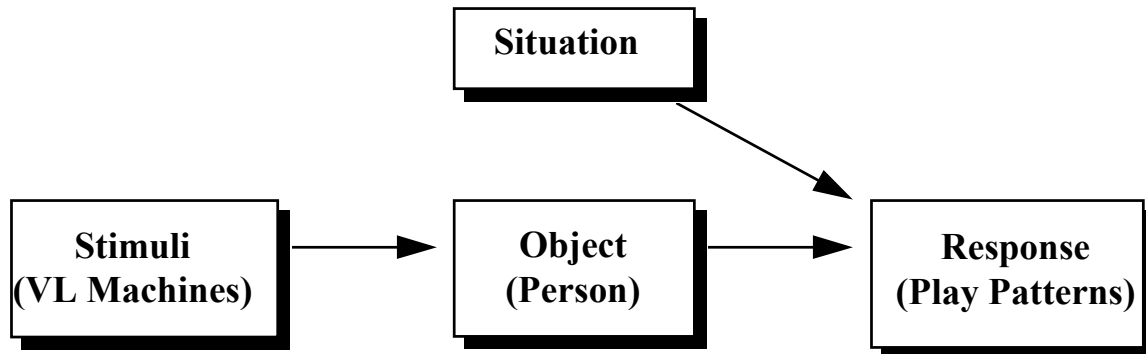
3.3.7 Motivations To Play

When asked why they play video lottery games, the reasons cited tend to differ substantially between the two principal player groups. The majority (59%) of Frequent Players play for fun and entertainment, whereas only 42% of Problem Players play for this reason. Problem Players are also less likely to say they play just to “fill time” or for “something to do” (20% compared to 42% of Frequent Players). However, players in both groups are equally likely to say they play for a chance to win money (21% to 26%).

Many Problem Players no longer feel that VL play is fun, or that it is a benign activity suitable for filling time. Instead, 38% (compared to 1% of Frequent Players) say they play because they succumb to their urges, they are compulsive, they are addicted. To some extent, this finding is a result of how the Problem Player segment was defined with those players who stated they have a problem with video lottery gambling (self declared problem) being automatically included in the problem segment. However, for many of these Problem Players, “*the thrill is gone*” suggesting they may be receptive to alternative activities, behaviours or other interventions as a part of the treatment for their “addiction.”

3.4 Situational Factors (Table 3.4, Appendix D)

Situational factors are those factors, outside of the person, that influence the behaviour in question. These are factors at work, home, or play that motivate the person to seek out VLT gambling and situations during the course of VL gambling that cause him/her to play longer, more frequently, or at higher bet levels. Understanding the influence of situational factors that trigger problem gambling should be of value in helping the player avoid or negate the impact of those situations.



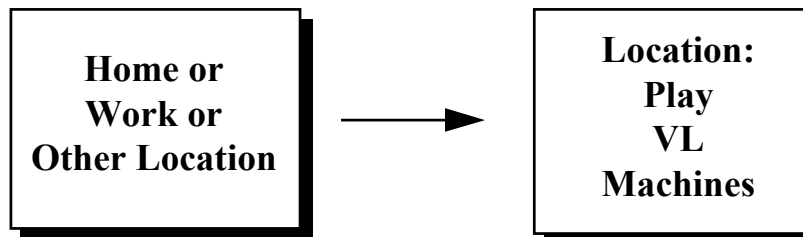
The situational factors are broken down into 1) the effect of exposure to the machines, 2) ease of access to the machines (convenience), 3) situations that lead to over-expenditure, 4) availability of cash, 5) factors in the work or school environment and, 6) the home environment.

3.4.1 Exposure

The Frequent and Problem Players tend to have comparable exposure to the machines and, on average, are in a location that have VL machines approximately 13.5 to 13.8 times a month. Thus, the level of exposure to the machines alone does not appear to be a strong factor in differentiating Problem Players from those who can be characterized as heavy or Frequent Players. However, the *situation* under which the two segments are exposed to the machines are significantly different.

In 66% of the occasions that the Problem Players play VL games, they had gone specifically to the location to play the machines (i.e., planned play). Thus, the decision was made prior to arrival in the location, either at home, at work, or at another location.

Problem Players Situational Model



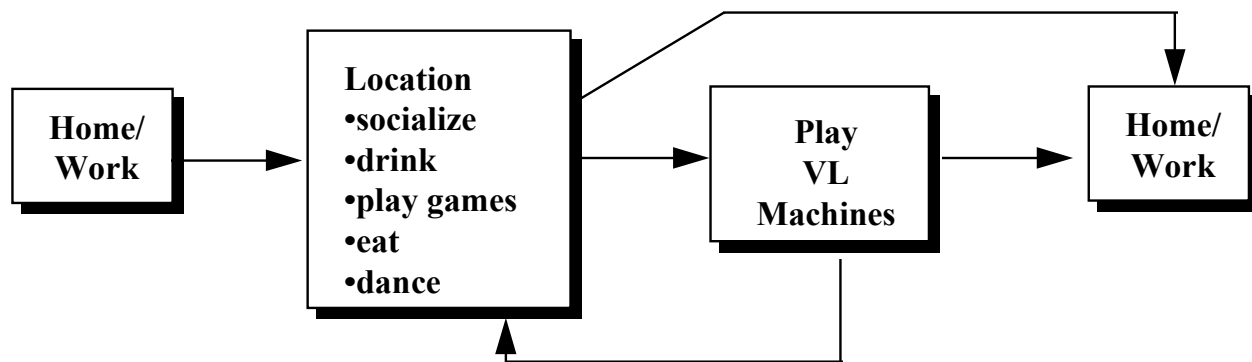
Only 40% of Frequent Players make their decision to play video lottery games outside of the location. This suggests VL gambling by Problem VL Gamblers is more planned and deliberate whereas, in the majority of cases, VL gambling by Frequent Players is more impulsive and secondary to other social activities. This has implications for Problem VL Gamblers both in terms of the situation at the time of the decision to play, and their decision to stop playing.

For many players, the decision to play is a primarily motivated by the fact that they really like to play. Problem VL Gamblers are more likely to be influenced by the situation at home where the alternative is to sit and watch TV, or when they are bored, depressed, and need to get out of the house.

Therefore, the key to controlling the behaviour for these Problem Players may be found at home, or work, where the situational triggers can be reduced, alternative activities made available and, ultimately, the response pattern for VL gambling interrupted or altered.

The second implication is that the locations where they play may have few other attractions for Problem Players that are worthwhile alternatives to VL gambling. For the majority of Frequent Players, the model below applies:

Frequent Players Situational Model



In this case, the Frequent Player goes to the location to socialize, play games, eat and drink or dance, as well as to play VL machines. It is easier for them to stop VL play because they have other attractions/interests or activities available on site. The Frequent Players want to play VL games, but want to do other things on the premises as well, whereas Problem Players have little or no attractive alternatives. One way to help the Problem VL Gamblers to stop playing when they feel they should would be to provide and/or support their involvement in alternative activities at the locations. Of course, some Problem Players jam the machines on, and return to them repeatedly, while they play pool or participate in other activities so the attractiveness of the alternative may have little impact for these particular Problem Players and, thus, different intervention strategies will be required. It may be that complete VLT avoidance will be required until the pattern of behaviour is altered. In Nova Scotia, this is difficult, as it would also entail avoiding the majority of licensed establishments in the province. “VLT free” bar locations may be very effective in assisting Problem Players in breaking the association between a bar or “social night out” and VL gambling. This removes the temptation to play until players have

developed activities or socializing which substitutes the reliance on VL gambling when in a bar situation.

3.4.2 Convenience

Ease of access to locations with VL machines does seem to play a role in problem play. The number of different locations that Frequent and Problem Players play in each month is the same (3.6). However, the Problem Players tend to have more regular locations (1.8 compared to 1.4 for Frequent Players), with the primary difference between the two segments being that Problem Players have more regular locations close to home (1.4 versus 0.9). This would, in part, explain why Problem Players are more likely to go directly to a location to play. Having a regular location makes it easier to play longer, as a player will more likely feel comfortable in their regular/familiar place. They are familiar with the staff, the staff know them and their habits, they know the other players, and the location is conveniently located close to home. The situation is much more conducive to extended play periods. This suggests that management and staff at VLT locations are likely in a position to recognize Problem VL Gamblers and, thus, may be trained to intervene or possibly assist players who wish to exert control over their play. At the very least, it would educate management and staff in VLT locations as to behaviours or practices associated with problem play that can be passed along to others (word-of-mouth).

3.4.3 Situations That Influence Over-Expenditure

Respondents were asked if there were situations where they spend too much time or money playing VL games. Fifty-four percent of Problem Players could identify specific situations, compared to only 12% for Frequent Players. Furthermore, 52% of the Problem Players found themselves in these situations in the last three months (compared to only 11% of Frequent Players), with half of these Problem VL Players (27% of Problem Players) indicating they frequently or always found themselves in such situations during the past few months.

These situations where players say they spend too much can be broken down into two broad categories: situations that occur in the location and situations that trigger or influence them to go to the location to play.

Location Specific Situations:

Drinking/drinking too much is the primary situational factor which Problem VL Gamblers claim causes over-expenditure (14% compared to 3% of Frequent Players). However, for the majority of Problem Players ($\approx 86\%$), alcohol plays little to no role in precipitating or affecting their problem play. This issue will be explored in more detail in Section 3.0 - Impact Of Play (Subsection 3.9.1.1 - Drinking) of this report where it is concluded that alcohol consumption does not play a major role in problem VL gambling for the majority of the Problem Players. However, in the present study, it is unclear as to the impact of alcohol for these adults when they are not playing the machines.

Situations Exogenous to Location:

For Problem Players, it was shown that they more often go to a location for the sole purpose of playing VL games. **The critical situations, therefore, are the ones that lead them to decide to go and play.** For some, it is a matter of having extra time and being bored (9%) and during days off from work (3%). For these people, VL is a way to pass time. The fact that they “pass time” with an activity they know is a problem suggests a compulsion to play, or a lack of drive/lack of personal resources to find a solution and, thus, the need to provide viable alternative activities to VL play.

As an alternative interpretation, it has been suggested in the gambling literature that “gambling to pass time” is a strong indicator of addiction. Thus, for these players, response towards video lottery gambling has become habitual and entrenched. Given the amount of time Problem Players allocate to VL gambling, they may no longer know what else to do to “fill” or pass time.

A fair percentage of Problem Players are triggered to play because of their need to “find escape.” They want to escape their problems or fighting at home (6%), or they are upset/depressed/frustrated (3%). Again, having alternative activities or coping strategies may help, but the problem gambling may persist while the need to escape exists. Unfortunately, one of the causes of the problems at home may be problem gambling itself.

3.4.4 Availability Of Cash

The availability of cash (or the lack thereof) can also be a trigger. Unfortunately, 8% of Problem Players say they play VL games when they are short of cash. Since they are, for the most part, playing on a frequent basis, one would expect they would know the odds of winning in order to cover a shortfall of cash. However, there is evidence that having gamblers learn the odds of winning can help them to overcome the belief that they can/will win (Ladouceur and Walker, 1996). This may, in turn, lead to less reliance on the machines when the player is low on cash. This is particularly important, as those players already short of cash may be putting themselves in a position of greater financial distress by hoping/believing that VL gambling will solve their problem.

There is another group who say they play too much when they have access to easy cash (payday: 4%), or when they have extra cash/or their bank card their pockets (3%). In these cases, mechanisms that control access to cash (only take so much to the location, have direct deposit of pay cheques, leave bank card at home) may be effective in managing the behaviour. In more extreme cases, it may be possible to establish limited access to funds designated for household use (i.e., rent, bills). These funds can be placed in a spouse’s account or an account that is not accessible by bank card.

Overall, the nature of the situations that trigger or influence play and, ultimately, lead to problem gambling are diverse. No single approach will work for all problem gamblers. Instead, situations must be identified and understood for each individual and then a specific solution can be devised and applied.

3.4.5 Situational Factors Related To The Work Or School Environment

It was hypothesized that ease of access to VL play at work or school, peer group acceptance of VL play and possible peer pressure to play at work, school or home would influence players to become Problem Players. To explore these issues, players were asked to indicate the availability of VL machines near to their workplace, and their play habits during, or around, work hours. They also indicated whether they have colleagues who play, and whether other adults in their household play.

There is an opportunity for the work environment to influence a large percentage of the players as 74% to 78% of regular players work outside the home. The school environment is less likely to be exerting an influence, with 10% to 11% of Infrequent and Frequent Players attending school, and only 4% of Problem Players attending school.

Contrary to expectations, Problem Players are less likely (3% compared with 7% to 9% for the other segments) to have VL machines located on the premises where they work. This suggests that having a machine on the premises may not lead to problem play. However, 21% of Problem Players say there are VL machines available close to their work or school, compared with 14% to 15% for the other segments. (It could be that Problem Players are more likely to be aware of VL machines located close to their work, or it may be that the accessibility of VL machines close to their work has contributed to the problem gambling; the direction of causality is difficult to determine.) Regardless, 14% to 21% of all regular players have easy access to VL machines during work hours.

The issue is, does the availability of machines lead to play, and are Problem Players more likely to take advantage of the accessibility? To address this issue, the two non-problem segments were combined in order to provide a valid contrast. The two Non-Problem VL Players' segments are defined based on frequency of play, consequently, by definition, any estimates based on frequency of play would be high for Frequent Players and low for Infrequent Players and, thus, any differences in the effect of accessibility on likelihood of play would be masked. Therefore, the Infrequent and Frequent Players were combined to offset any bias which may simply be due to frequency of play rather than a greater tendency to be involved in the specific play behaviour being examined (i.e., play of machines while at work or school).

Play of VL Machines While At Work or School

	Infrequent & Frequent Players (n=594)	Problem Players (n=117)	(Significant) Difference
Played video lottery machines during work or school hours in the last month	8%	15%	7%
Played on breaks/between classes	3%	6%	----
Played at lunch time	5%	7%	----
Played at other times	2%	8%	6%

■ - indicates differences significant at the 90%+ confidence level ($p < 0.10$).

Problem Players are more likely to play VL machines during work hours (15% versus 8%). While some of these players do play during breaks (6% versus 3%) and during lunch (7% versus

5%), they differ from non-problem players in that they are more likely to play at "other times" during work or school hours (8% compared with 2%). For the most part, this is a euphemism for "playing when I should be working". During the pilot phase of the study, it was determined that respondents felt a direct question was too threatening. However, excluding play at lunch and breaks, and then asking for play at other times, allowed the respondent to indicate play during those times when they should be working.

Accessibility to, and thus play of, VL machines during work hours does not appear to be a major problem for regular VL players in general. For the most part, it is only the Problem Players who may be adversely affected by access to the machines and who are playing when they should be working. This happens with 8% of all Problem Players, which is not a large part of the segment, but still is cause for concern due to the potential impact on their employment status should this behaviour be discovered.

3.4.6 Situational Factors Related To The Home Environment

One situational factor that could influence problem play is the presence of one or more other adults in the household who play video lottery on a regular basis, and are perhaps themselves a Problem Player. When the other adult(s) in a household is/are also regular player(s), problem play is more likely to be tolerated, supported or induced. This may also reduce the chances of the Problem Player seeking or receiving any assistance or pressure (intervention) from the other adults in their households to reduce or eliminate their problem play.

Problem Players and Frequent Players are equally likely to have another regular VL player in the household (32% and 31%), as compared to only 21% of Infrequent Players. **This suggests that frequency of play is related to the probability of having another regular VL player in the household, but that having another regular player in the household does not necessarily lead to problem play.** However, it is possible that, once a person is a Problem Player, having another regular VL player in the household may make it more difficult to reduce problem play, as the other adult will be more tolerant of the behaviours that lead to, or contribute to problem play.

This issue of the possible influence of other adults in the household was examined in more detail by analyzing those households in the sample in which two or more adults play VL games regularly. It is possible that if there is one Problem Player, the other regular player(s) in a household is(are) more likely to have problems with VL gambling as well. This would suggest that Problem Players are influencing or contributing to problem play for other adults in the household. Furthermore, the impact of problem VL play within a particular household may be substantially greater than analysis at the individual level would indicate. (It would also suggest that prevalence studies that only sample one adult per household may be underestimating the prevalence of problem gambling, in particular, as it relates to video lottery gambling.)

In this study, if there were more than one regular player in a household, all of the players in the household were surveyed. This sampling procedure makes it possible to determine the number of Infrequent, Frequent and Problem Players in each household. There were 141 regular players surveyed in households where one or more surveys were completed with another regular player in their household. Within this sub-sample, there are 47.5% Infrequent Players, 36.2% Frequent

Players and 16.3% Problem Players (versus 46%, 37.5% and 16.5%, respectively, in the total sample). The following table shows the percentage of other regular players in the household that belong to the three segments.

Percentage Of Other Regular Players In Household By VL Player Segment

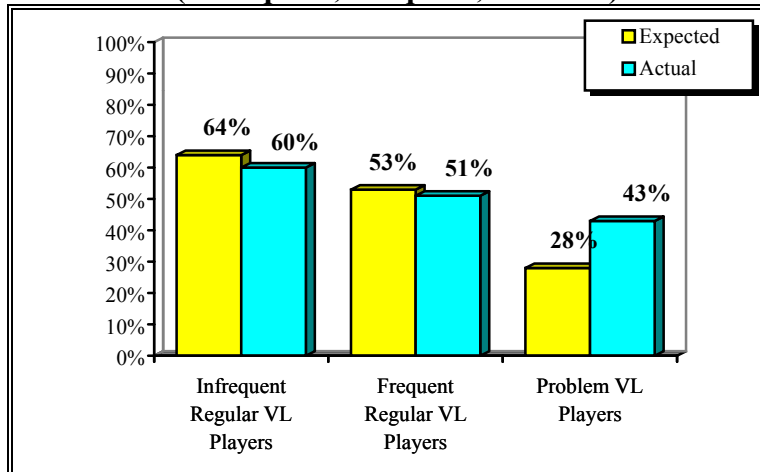
	Infrequent Players (n=67)	Frequent Players (n=51)	Problem Players (n=23)
Other Regular Players In Household Are**:			
Infrequent Players	60%	39%	35%
Frequent Players	28%	51%	26% *
Problem Players	12%	14% *	43%

** one Frequent Player and two Problem Players live together which makes the totals greater than 100%.*

*** the average number of adults per household is 2.3 for all three segments. Therefore, any differences found among the segments cannot be attributed to differences in the number of adults in the household.*

If segment membership is independent within a household (i.e., one adult does not influence the level or type of VL play by another adult in the household), then it would be expected that 64% of Infrequent Players would have another Infrequent Player in their household, 53% of Frequent Players would have another Frequent Player in their household, and 28% of Problem Players would have another Problem Player in their household. These expected proportions are very close to those found for Infrequent Players (60%) and Frequent Players (51%), suggesting that other regular play has little influence on their own behaviour if they are not a Problem Player. However, **43% of the Problem Players live with another Problem Player which is significantly higher than would, statistically, be expected ($p < .010$; χ^2 corrected one tailed test).**

Graph 3.4.6
Expected Vs. Actual Incidence of Other Similar
Regular VL Players In Those Households With Each Of
The Three Types Of Regular Players
(Infrequent, Frequent, Problem)

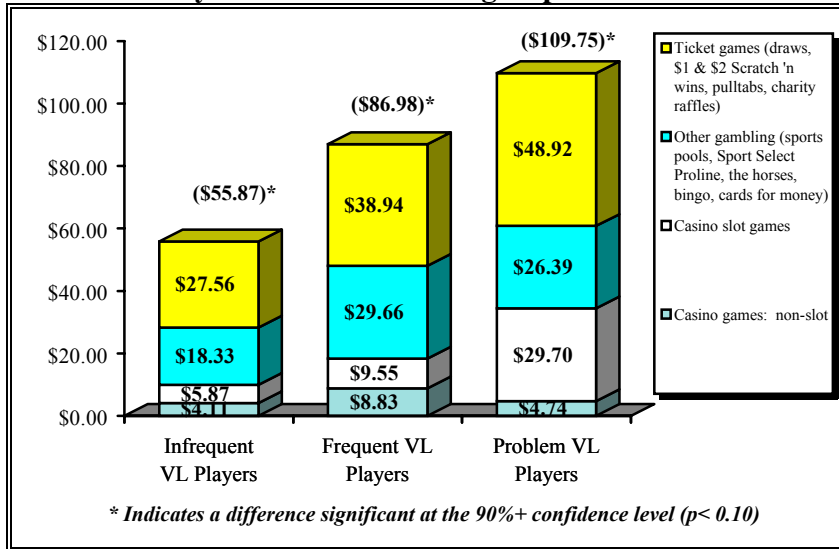


This has implications both for finding Problem Players, and for helping them. First, if a Problem Player is identified (e.g., they go to a community centre for help, or call the Gambling Help Line) and they live with another person who is also a regular VL player, there is a 43% chance that person will also need help in overcoming a problem with VL play. Second, if a Problem Player is identified then there is a good probability that the problem is influenced by the fact that there is another Problem Player at home. Therefore, assisting them in dealing with their problem VL

play may be facilitated by helping both Problem Players in the home to overcome their problem with video lottery gambling. It is obvious that counselors need to be aware of the possibility of a companion also in need of help, and to focus on solving the problem at the household level whenever necessary.

3.5 General Gambling Play & Average Expenditure (Table 3.5, Appendix D)

Graph 3.5
Monthly Non-VLT Gambling Expenditure Profile



On average, VL Problem Players spent more on other forms of gambling in the last month than either of the other two segments (\$109.75 compared to \$86.98 for Frequent Players and \$55.87 for Infrequent Players).

These figures illustrate a strong commitment to gambling in a variety of forms by the Problem Players. They are less likely to play non-slot casino games than the Frequent Players (18% versus 33%), and are equally likely to play slot machines at casinos (60% versus 57%). However, Problem Players

spend more than three times as much money, on average, each month than those in the Frequent Player segment (\$29.70 versus \$9.55) on casino slot machines. So, **while the Problem VL Player is typically involved in various gambling activities, they have a particular affinity for VLT/slot machine types of gambling.**

It might be speculated that the play of VL machines is simply diverting cash that otherwise would be spent on other traditional, high stakes or more serious gambling such as horse racing, sports betting and casinos. Problem VL Players are less likely than Frequent Players to spend money “on the horses” (\$0.21 versus \$6.16) and less likely to participate in sports bets/pools (12% versus 19%). They also spend less on Sport Select Proline (\$1.21 versus \$2.69). These games are all sports oriented and they require more reasoned wagering (selection of horses, players and teams, as well as spreads and placing, etc.). Problem VL Players also are less likely than Frequent VL Players to gamble on non-slot casino games (18% versus 33%). It is not clear, therefore, whether these particular wagering activities would be attractive alternatives to VLT’s for Problem Players, should access to VL machines be restricted. They may not be interested or attracted to these more skill-based forms of gambling which, typically, require some knowledge (or interest level) in order to play.

These results suggest that Problem VL Gamblers are strongly attracted to gambling in general (although their response towards skill based gambling typically is lower), and that VLT’s are a particularly compelling outlet for this drive. Regardless, they appear to seek variety in their gambling and participate in the full spectrum of games available, in particular VLT’s, and to a lesser extent slot machines (60% of Problem VL Gamblers played slot machines at a casino in the last month).

On average, Problem Players are currently spending \$808.88 per month on VLT’s which is substantially more than the \$29.70 they are spending on casino slot machines. However, this level of expenditure on casino slot machines shows a particular affinity toward this type of gambling which suggests slot machines would be a potential substitute for VL machines, should access to VLT’s be restricted.

3.6 Video Lottery Play Behaviour (Table 3.6, Appendix D)

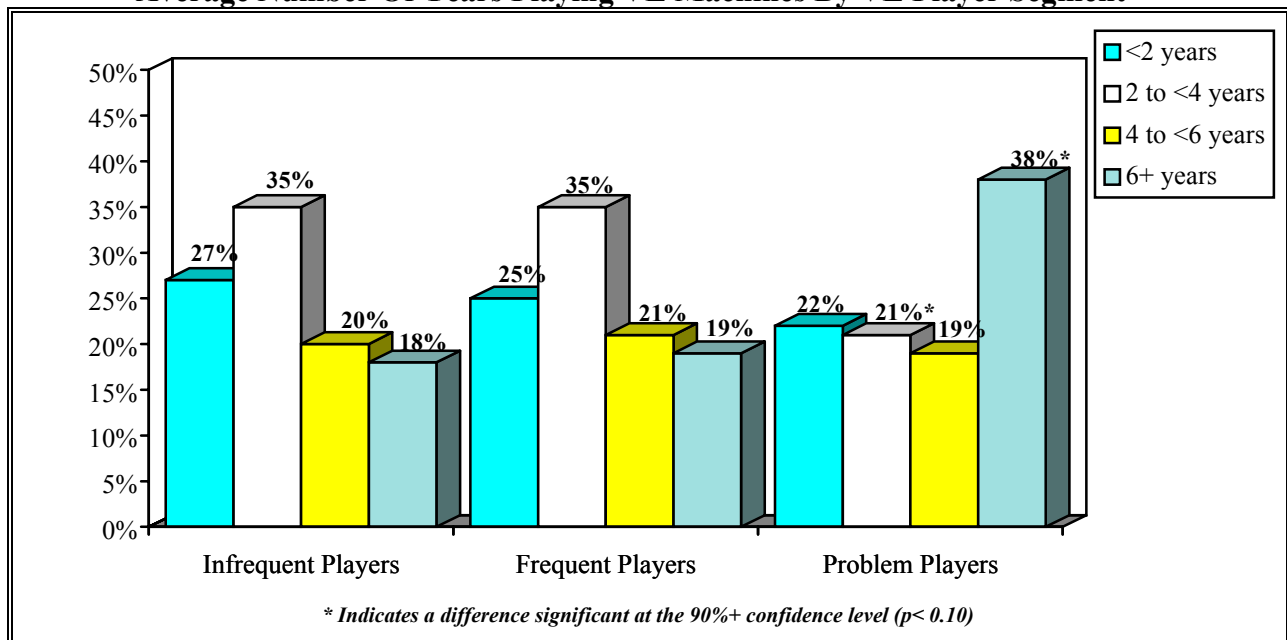
This section of the report profiles and contrasts the play behaviour of the three Regular VL Player segments. It examines time and money spent (years playing, times per month, minutes of play and expenditure amounts), games played, where they play (legion centres, sports establishments, etc.), when they play (day of week/weekend, times of day), play in more than one location in a day, plays at one location, quitting behaviours, the play of two or more machines simultaneously, superstitious behaviour while playing, and social play.

Differences in play behaviours between the Frequent and Problem Players are a result of differences in demographics, lifestyles, situations as well as attitudes and motives, which are themselves a result of past play behaviour.

3.6.1 Length Of Time Involved In Regular VL Play

It might be expected that, over time, most Problem Players would drive themselves into bankruptcy, or develop coping mechanisms that would take them out of the "Problem" category. If this were true, then the average length of time Problem Players have been playing would be less than the time Frequent Players had been playing. This is not the case, with Problem Players having played, on average, for 54.9 months compared to 39.9 to 40.5 months for the other Regular Player segments.

Graph 3.6.1
Average Number Of Years Playing VL Machines By VL Player Segment



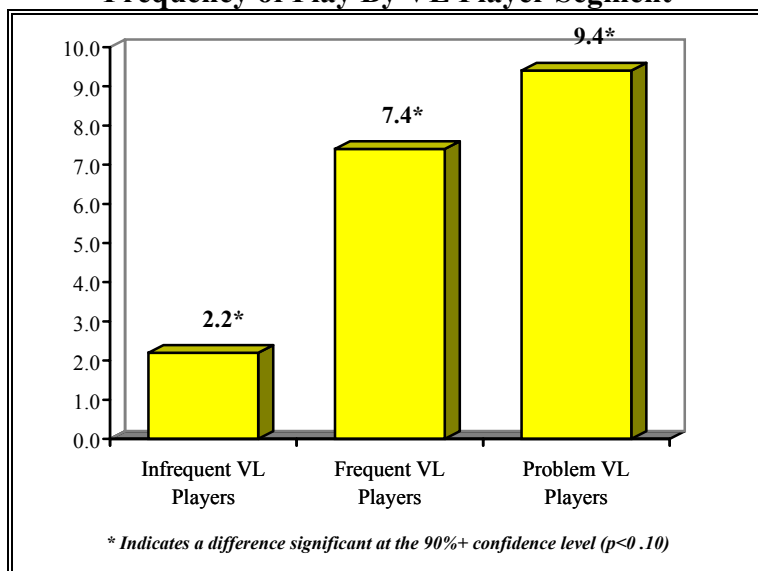
The distribution for the Frequent and Infrequent Players is virtually identical. However, compared to these two segments, there are fewer Problem Players who have been playing from two to less than four years (21% compared to 35%) and more who have been playing six years or longer (38% compared to 18% to 19%). It is obvious from this that the impact of VL play for many Problem Players has been on-going over many years. The key issues then become, what

are the financial and social implications of their long-term play, and what have these people done, or attempted to do, to control and/or change their problem play? These issues will be addressed in Section 3.9 - Impact Of VL Play and Section 3.10 - Coping Mechanisms.

3.6.2 Frequency Of Play

As discussed at the beginning of the Problem Player analysis, regular players who did not fall into the problem category were split into two segments based on their reported average frequency of VL play each month: Infrequent Players (play less than once a week, on average) and Frequent Players (play once a week or more, on average). There is no difference in the reported average number of times Frequent Players and Problem Players play the games. In recognition that play levels can vary substantially for a given individual over time, monthly play frequency was also derived specifically based on play in the last month. Players were asked how often they had been in a location which had video lottery machines; how many times they went to specifically play video lottery games; and how many times they went for another reason but ended up playing, all within the last month. Frequency of play using these questions is slightly higher for Infrequent Players (2.2, up from 1.6) who may not have remembered to include those times when they played on impulse in their average frequency estimates. It is also higher (9.4, up from 8.0) for Problem Players, who are more likely to play at more than one location on a given day and play at more locations in general, and, thus, may have excluded play occasions at these other locations. Interestingly, there was no change in the average number of times Frequent Players played VL in the last month.

Graph 3.6.2
Frequency of Play By VL Player Segment

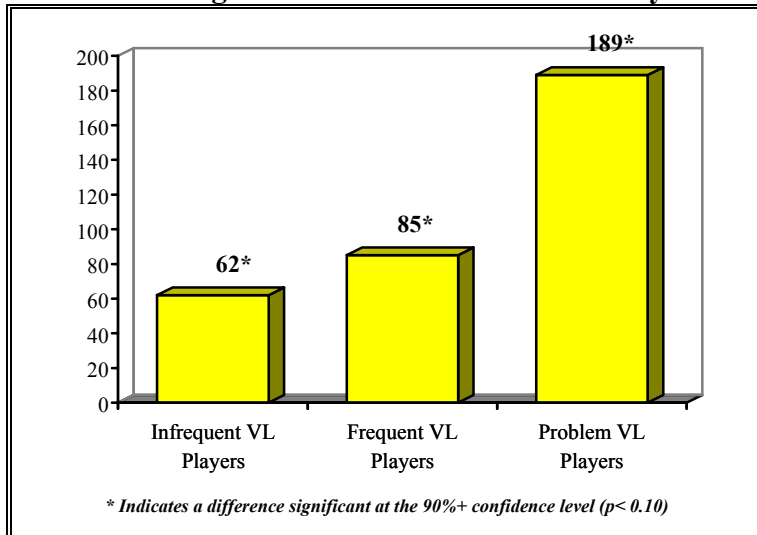


Using the derived estimate of frequency of play, the Problem Players, on average, tend to play the games more often (9.4 times per month) than either Frequent Players (7.4 times) or Infrequent Players (2.2 times). **The difference between reported and derived play frequency estimates for Problem Players suggests that in addition to their high level of frequency for planned play, they may also be more impulsive about play. However, the difference in the number of times played per month between Frequent and Problem VL gamblers (7.4 versus 9.4 times) makes a relatively small**

contribution to explaining the difference in total expenditure between the two frequent playing segments.

3.6.3 Time Spent Playing VLT's

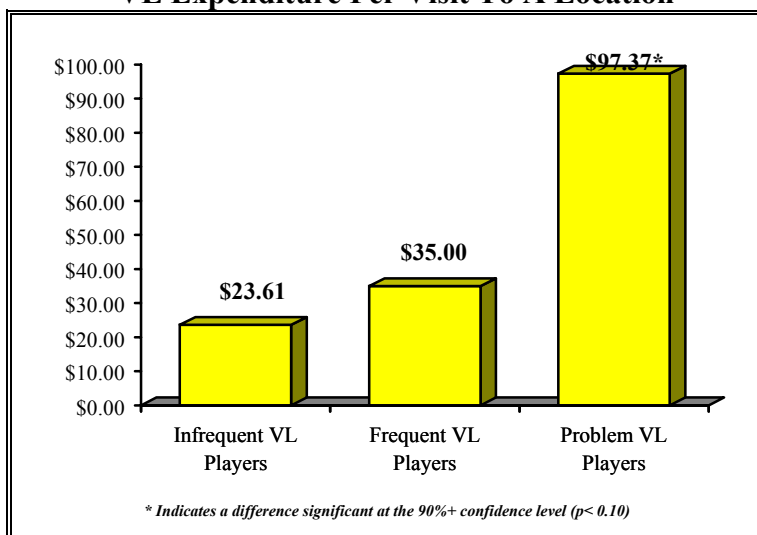
Graph 3.6.3
Average Minutes Per Location Per Day



A factor that does contribute substantially to the difference in expenditure is the length of time players spend at a machine each time they play or, more specifically, the total time spent playing at a particular location (given that some players will play at a location more than once in a single day). Problem Players will spend two and a half hours playing at a time (150 minutes) while Frequent Players play for a little over an hour (67 minutes) and Infrequent Players only play for 43 minutes, on average, each time they play. When those who play at a location more than once in a day are factored in, the average amount of time spent playing VL games at a particular location in a day is over three hours (189 minutes) for Problem Players, close to an hour and a half (85 minutes) for Frequent Players and an hour (62 minutes) for Infrequent Players. The length of time Problem Players spend playing VL games is roughly twice as long as Frequent Players and, therefore, makes a significant contribution to the difference in expenditure.

3.6.4 VL Expenditure

Graph 3.6.4a
VL Expenditure Per Visit To A Location



Per Visit Expenditures:

Expenditures on VL machines were broken down based on discrete events to increase the accuracy of the estimates and to provide multiple methods of deriving estimates in order to assess validity. At the lowest level, players were asked to estimate the out-of-pocket (excluding winnings) average amount they spent on video lottery play each time they played over the last month. (The sample interval of a month was chosen, as virtually all respondents played at

least once over the last month and could, therefore, give an estimate). Each time they play, Frequent Players (\$29.44) spend substantially more than Infrequent Players (\$16.33), with

Problem Players (\$82.29), on average, spending almost three times as much as Frequent Players each time they play the machines. Interestingly, when the total number of times played during a single visit is considered, there is no significant difference in the amount spent per visit between Infrequent Players and Frequent Players (\$23.61 versus \$35.00). The expenditure per visit rises to \$97.37 for Problem Players when their repeated play at a location is taken into account. **This means that each time a Problem Player walks into a location and plays VL games, they are going to spend \$62.37 more than a Frequent Player would, which is a differential of approximately 177%. It may be that encouraging Problem Players to “break-up” their playing sessions by cashing out, or stopping, every half hour or forty-five minutes may make them more aware of what they are spending and interrupt their play response.**

Monthly Expenditures:

Monthly expenditure on VL gambling was estimated using two measures:

- ♦ perceived expenditures;
- ♦ derived expenditures.

Perceived VL expenditure is based on a question asking the respondents to estimate, referring to the previous three months, on average, approximately how much they spent, out-of-pocket, per week (or per month) on video lottery games, not including winnings. Based on this question, Infrequent, Frequent and Problem Players spent \$29.79, \$146.69 and \$473.83 per month respectively, over the last three months. These amounts may appear to be substantial to many observers. However, based on past research conducted by Focal Research Consultants Ltd., it has been found that these estimates substantially underestimate players' actual expenditures, although the *relative* expenditure by segment is fairly accurate. Instead of relying on players' perceptions of what they spent over the last three months, a more accurate estimate is derived by breaking expenditure into its component parts according to the formula below:

$$\text{Monthly Expenditure} = \left[\begin{array}{c} \text{Out-Of-Pocket} \\ \text{Expenditure Per} \\ \text{Play} \end{array} \right] * \left[\begin{array}{c} \text{Average} \\ \text{Number Of} \\ \text{Plays Per Visit} \end{array} \right] * \left[\begin{array}{c} \text{Number Of Times} \\ \text{Played At} \\ \text{Establishments Over} \\ \text{The Previous Month} \end{array} \right]$$

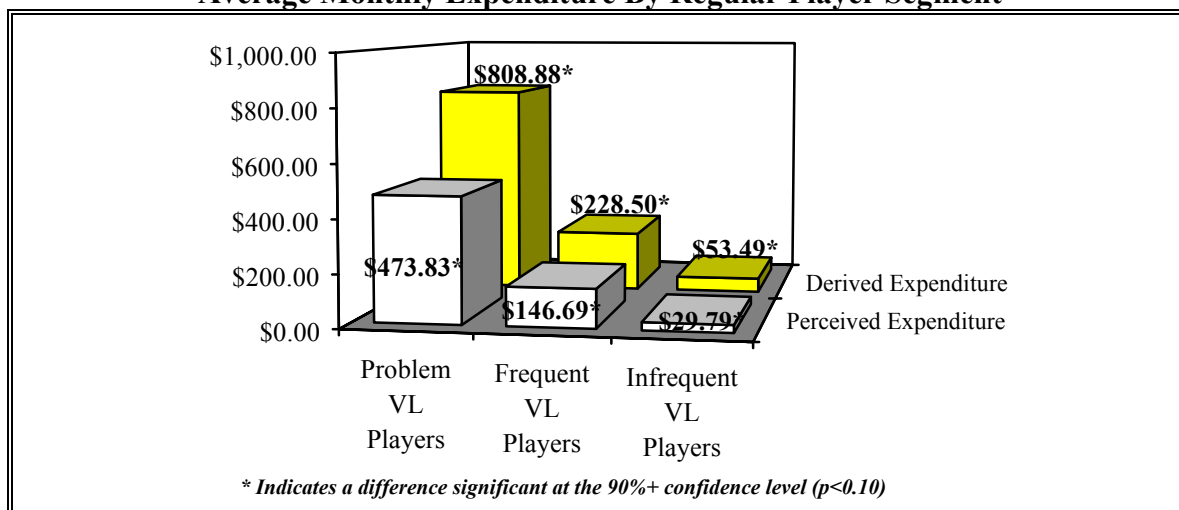
Given the **continuous nature and accessibility** of video lottery play, it is difficult for players to accurately keep track of their expenditures. This is one of the key factors contributing to players' problems in managing their play. However, players find it easier to provide out-of-pocket estimates of expenditure on a per play basis, as it is more relevant to their actual play experience. (*"I usually put \$20.00 into the machine when I sit down and play until I lose it."*) By applying per play estimates to the actual number of times they played in the last month, average expenditure estimates will be more accurate on an aggregate and segment basis, but may over-or underestimate actual expenditure on an individual basis. This is due to the fact that some players will have played more than usual in the last month and others may have played less. However, in any given month, it can be expected that this same fluctuation in play levels will occur for other players. When these estimates are then projected to obtain annual expenditure rates, higher amounts will be balanced by amounts which are substantially lower, thus yielding highly accurate estimates on a total aggregate basis.

The Monthly Expenditure equation tends to yield higher monthly expenditure estimates for most players (43% of players), and reduce it for others (29% of players). The increases are due to the fact that players are specifically reporting on their behaviour over the last month. They are better able to remember how often they play more than once at an establishment, and recall more accurately how often they played at establishments even though they had gone there for another purpose. (The number of visits to establishments is based on the sum of responses to two questions: "In the last month, how many times that you were in a location that had VL machines did you go there specifically to play VL games?" and "How many times did you go to a location for another reason but ended up playing video lottery games while you were there?") The estimates derived using this approach have consistently been within two to four percentage points of the per adult expenditures derived from the Nova Scotia Alcohol & Gaming Authority reports.

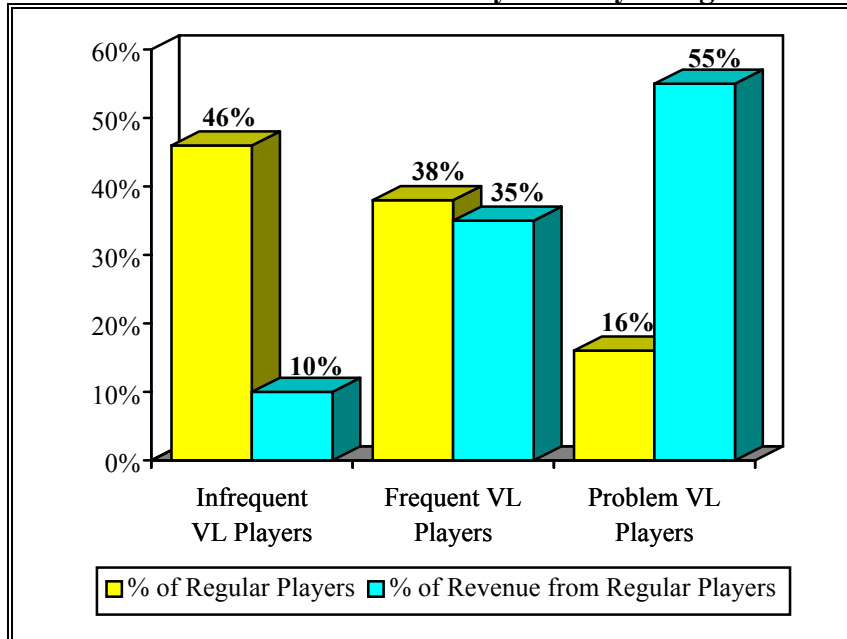
In this case, the derived estimate for net expenditures on VL gaming in Nova Scotia by regular VL players is approximately \$113.7 million in 1997, which compares very well to the net revenue from VL gaming of approximately \$120 million for Nova Scotia for the fiscal year 1997/98. *(NOTE: The contribution of casual VL play is not included in net expenditures for regular players and is estimated at approximately \$3.3 million. Thus, the projected VLT net revenue for Nova Scotia in 1997 is approximately \$117 million which is within 2.5% of the actual reported revenue of \$120 million for 1997/98.)*

As well as having external validity, the derived measure is highly correlated (0.85) with the estimate based on player perceptions, thus providing convergent validity. **Based on the derived estimate, Problem Players spend an average of \$808.88 per month, compared to \$228.50 and \$53.49 per month for the Frequent and Infrequent Players, respectively. This means that Problem Players account for a disproportionate amount of the total revenue coming from regular players (who collectively account for approximately 96% of all VL revenue).**

Graph 3.6.4b
Average Monthly Expenditure By Regular Player Segment



Graph 3.6.4c
VL Revenue Contribution By VL Player Segment



As illustrated in Graph 3.6.4c, 55% of the VL gambling revenue in Nova Scotia contributed by regular players comes from Problem Players. These are people who, for the most part, recognize they have a problem and don't wish to be playing and spending as much as they do.

The average Problem Player would be spending \$9,706.56 per year. They represent 0.92% of adults in Nova Scotia (16% of the

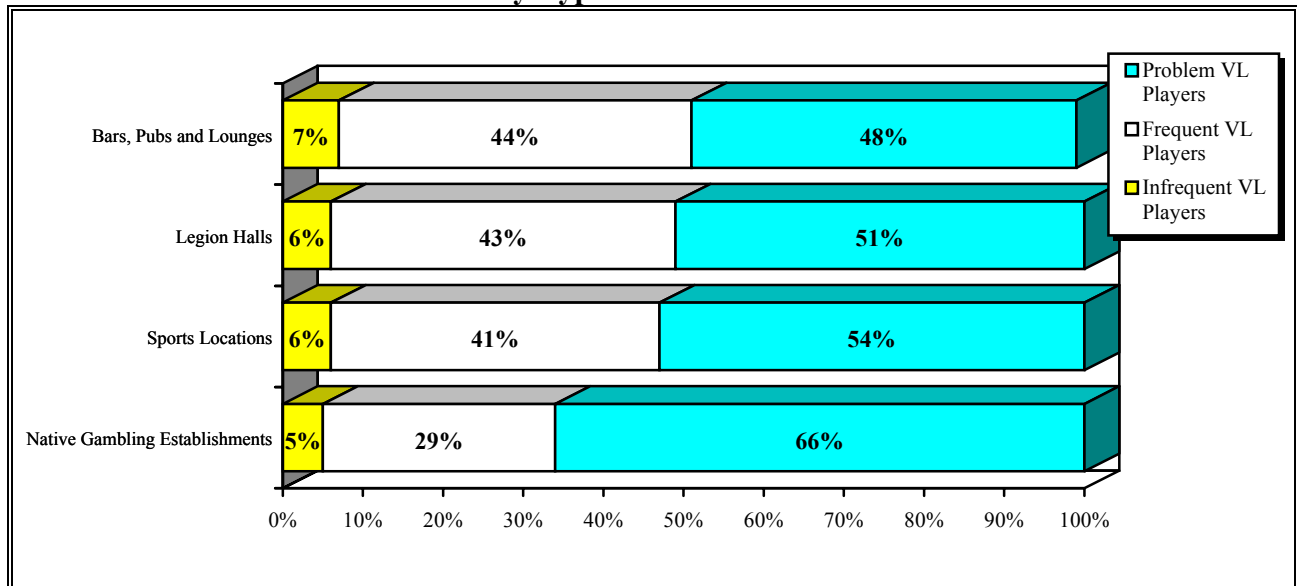
5.75% of adults who are regular players) or approximately 6,400 Nova Scotians who collectively spend a total of approximately \$62 million on VL play. Overall, VL expenditures by Problem Players in the province comprise approximately 53% of total VL gaming revenue in Nova Scotia (i.e., including revenue from Casual VL Players).

It is obvious that success in helping Problem Players to reduce their expenditures will have a substantial impact on the total revenue Nova Scotia derives from VL play. If Problem Players' expenditure was similar to that noted for Frequent Players, there would be a reduction in total revenues from VL gambling of approximately 35% to 40%.

3.6.5 Locations For Video Lottery Play

On average, Problem Players tend to have more regular locations at which they play video lottery games, therefore, it is reasonable to find that they are more inclined to be regular patrons of certain types of establishments. Both Frequent and Problem Players regularly play in bars, pubs, lounges and licensed restaurants (65% to 68%) and at legion centres (18% to 20%). However, Problem Players are more likely to play regularly at sporting establishments such as pool halls, bowling alleys, curling clubs and golf courses (21% versus 14%). They are also more likely to play regularly at Native gambling establishments (9% versus 4%). These are the type of establishments where the ratio of patrons to machines is typically relatively low, when compared to many bars and pubs. This puts less pressure on the players to "give up" their machine. Also, they do not like to be watched while they play and the greater solitude to be found at a curling club, for example, allows them to comfortably play longer and in relative anonymity.

Graph 3.6.5
Segment Profile Of Players In Front Of Machines At Any Given Time
By Type of Location

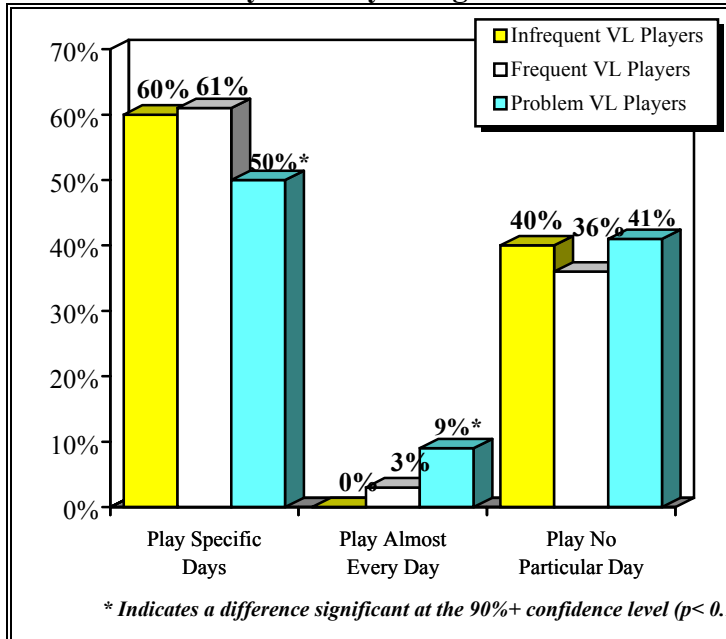


These figures tell us where players in the three segments like to play, but does not tell us the profile of the players at each type of location at any given time. The fact that Problem Players play 8.0 times a month, on average, compared to 7.2 and 1.6 for the other two segments, and the fact that Problem Players average approximately 150 minutes in front of the machines each time they play (compared to 43 minutes for the Infrequent Player and 67 minutes for Frequent Players) suggests that they are much more likely to be in front of a machine at any given time. Taking these figures into account leads us to the conclusion **that the 16% of players who are Problem Players occupy 48% to 66% of the machines at any particular time, depending on the type of establishment in which they are playing. Therefore, it is not surprising that people, in general, believe the majority of regular VL gamblers have problems since, at any given time, at least half of those in front of the machines will be Problem Players.** The same analysis shows that Frequent Players, who make up 38% of the player base, occupy between 29% and 44% of the machines at any given time. The Infrequent Players comprise 46% of the player base, but only occupy between 5% to 7% of the machines at any given time.

These results suggest that if one wants to find Problem Players, go into any pool hall, sports bar, legion hall, or especially Native gambling establishments and at least half of the people at the machines will be Problem Players. The odds of finding a Problem Player are improved if one visits that establishment at different times of the day.

3.6.6 Days Of Week & Time Of Day For Play

Graph 3.6.6a
Day Of The Week Playing Patterns
By VL Player Segment



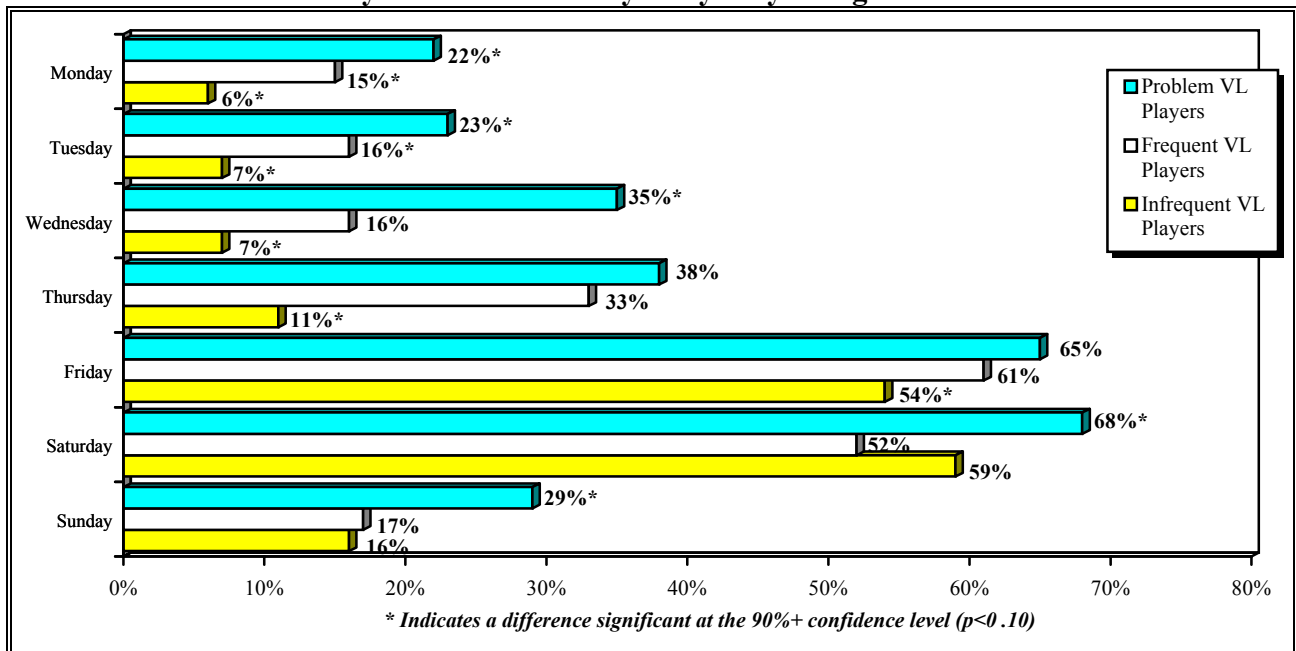
Days Of Week:

Although the majority of Regular VL Players, in all segments, tend to play VLT's on specific days of the week, comparatively, Problem VL Gamblers are more inclined to indicate they play every day/most days (9% versus $\approx 3\%$) and are less likely to report specific days played than other Regular Players (50% versus $\approx 61\%$).

There are no significant differences noted among the three segments in terms of those who report they do not play on any particular day (36% to 41%).

In order to assess differences in the "days played" among the three segments, those players who report daily play were included in the estimates for each day of the week. Furthermore, for purposes of this analysis, it is assumed that, within each segment, the distribution of "no particular day" mirrors the distribution of those who play on particular days.

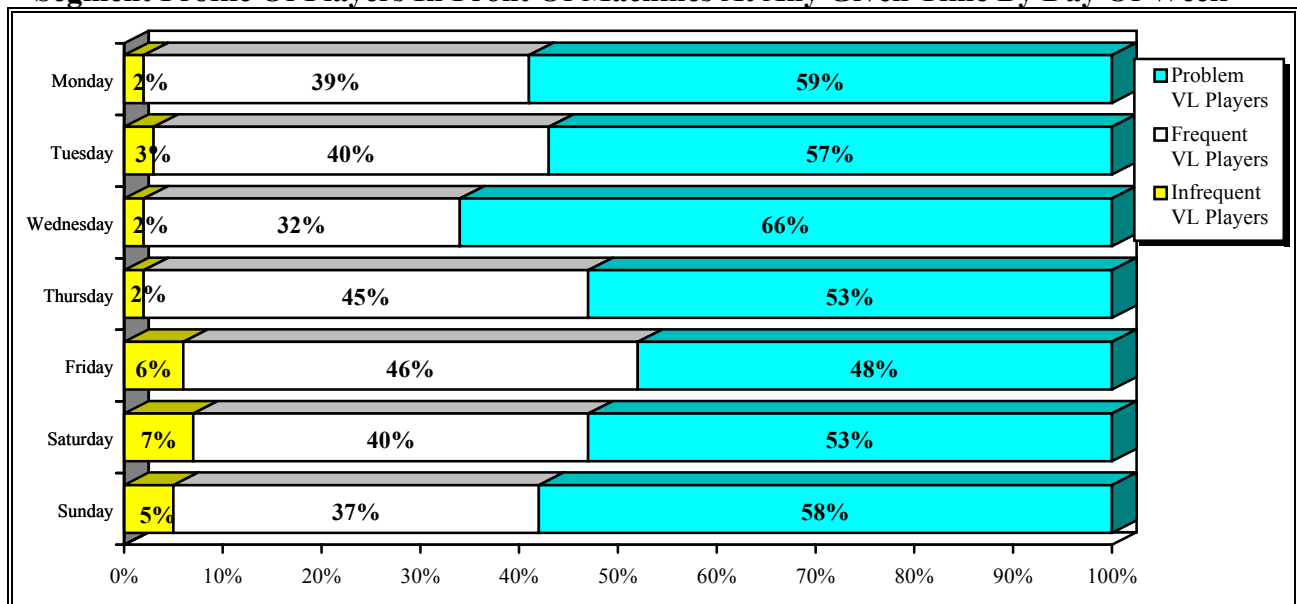
Graph 3.6.6b
Day Of The Week Played By Player Segment



Friday and Saturday are the most popular days of the week for VL play by Regular VL Players in all three segments. Typically, more than half of all Regular Players are playing the games on these days. Infrequent VL Players (54%) are less inclined to play Friday than either Frequent (61%) or Problem VL Gamblers (65%). However, Problem VL Gamblers are more likely to be playing on Saturday (68%) than players in either of the other two segments (52% to 59%).

It is noteworthy that Frequent and Problem VL Gamblers tend to report similar levels of play for Thursday (33% versus 38%) and Friday (65% versus 61%). It is play on other days, especially Sunday to Wednesday, which distinguishes playing patterns between the two segments. **It appears that Problem VL Gamblers tend to get an early start on the weekend, with just over one-third (35%) playing on a Wednesday which is twice as high as that noted for Frequent Players (16%) and five times higher than for Infrequent Players (7%). Play for Sunday to Tuesday is also significantly higher for Problem VL Gamblers, with Infrequent Players least likely to be playing on Monday (6%), Tuesday (7%) or Wednesday (7%).**

Graph 3.6.6c
Segment Profile Of Players In Front Of Machines At Any Given Time By Day Of Week



A profile of those players in front of a VLT machine at any given time on a particular day of the week was calculated. Based on the number of players, the frequency of VL play and the length of time playing, it is possible to derive estimates of the proportion of players accounted for by each segment.

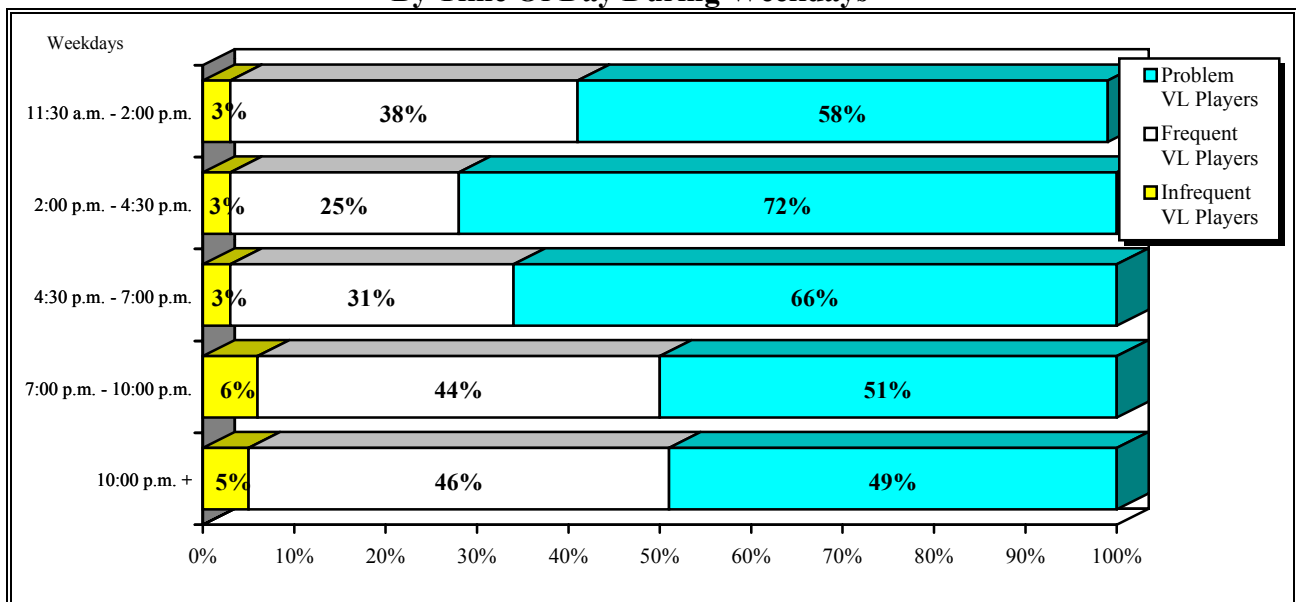
At any given time, Problem VL Gamblers will comprise approximately half or more of the adults observed playing. **From Sunday to Tuesday, more than half of the people sitting in front of VLT's will be Problem Players, and on Wednesdays this proportion increases to two-thirds of all those playing the machines.**

During the weekdays, Problem Players are more likely than Frequent Players to be playing the machines in the afternoon (between 2:00 p.m. and 4:30 p.m.: 17% compared to 6%),

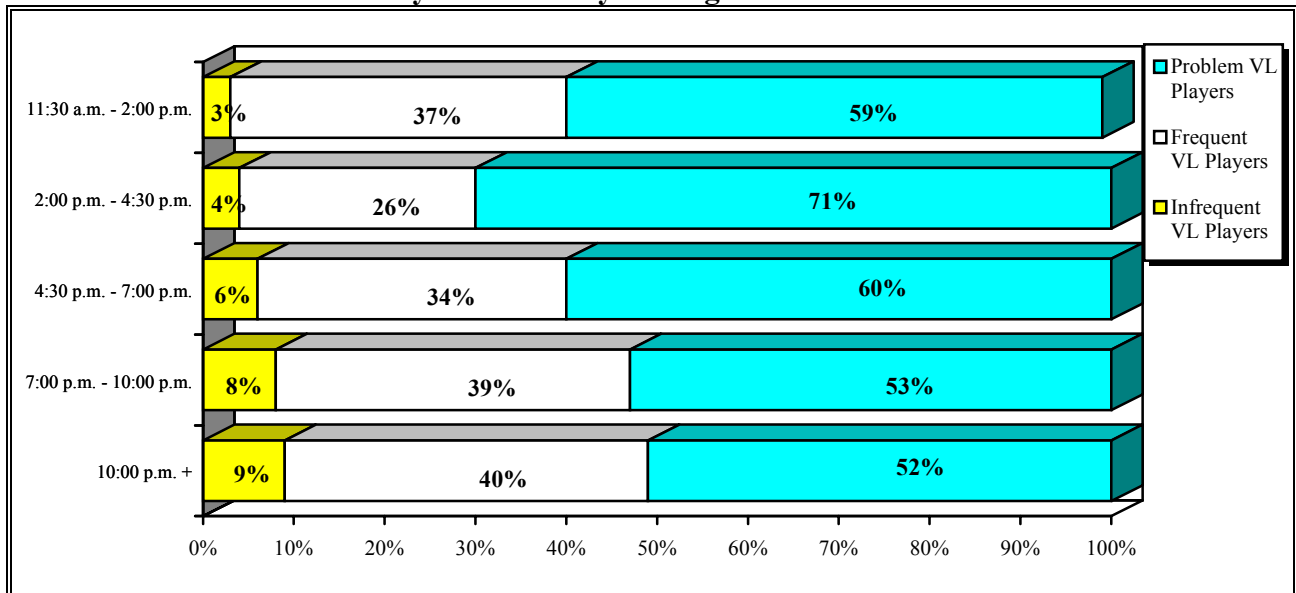
and at supertime (between 4:30 p.m. and 7:00 p.m.: 19% compared to 10%). The heavy play period for both these segments is in the evening, between 7:00 p.m. and 10:00 p.m. (30% - 32%) and after 10:00 p.m. (16%).

During the weekend, the Problem Players who say they play at specific times are more likely to be playing in the afternoon from 2:00 p.m. to 4:30 p.m. (21% compared to 8% for the Frequent Players). Demand for the machines, overall, is lowest in the afternoon, even on the weekends, and this appears to be the time that the only people left playing are the Problem Players.

Graph 3.6.6d
Segment Profile Of Players In Front Of Machines At Any Given Time
By Time Of Day During Weekdays



Graph 3.6.6
Segment Profile Of Players In Front Of Machines At Any Given Time
By Time Of Day During Weekends



Taking into account the number of times they play in a given month, and how long they play, Problem Players are, again, more likely to be the players in front of the machines at particular times. **During the weekdays, Problem Players make up 72% of the players in front of the machines from 2:00 p.m. to 4:30 p.m.**

They are also very likely to be one of the people occupying the “VL” stools between 4:30 p.m. and 7:00 p.m. (66% compared to 31%), and over lunch, from 11:30 a.m. to 2:00 p.m. (58% compared to 38% for Frequent Players). The numbers are very similar during the weekend, with 71% of the machines played by Problem Players in the afternoon, from 2:00 p.m. to 4:30 p.m. During the morning and dinner times, Problem Players make up about 59% to 60% of the players at the machines.

During the weekday and weekend evenings, the Problem Players comprise 49% to 53% of players, with Frequent Players accounting for 39% to 46% of the machines and Infrequent Players accounting for 5% to 9% of them.

The fact that Problem Players make up a larger proportion of the players found during lunch to supper times does not mean that most of the Problem Players can be found at these times in the VL locations. Only 37% of VL Problem Players, who said they play at specific times, play before the evening (although another 21% say they play anytime which could bring the total to 58%). Comparatively, only 22% of Frequent Players (and another 22% who play any time) and 14% for Infrequent Players (and another 29% who play any time) typically play prior to 6:00 p.m.

3.6.7 Number of Locations Played In A Day

Problem Players are much more likely to play at more than one location in a single day than Frequent Players (44% compared to 19%). In fact, 26% (compared to 8% of Frequent Players) play in more than one location in a given day at least occasionally (i.e., 25% of the time or more).

In order to minimize interview time, respondents were not asked to describe why they moved locations. However, given their beliefs in lucky machines and lucky locations, there is a good chance Problem VL Gamblers are motivated to move in order to improve their luck. Also, given their desire to avoid spectators, and that they often play for hours on end, they may move to new locations when it becomes too crowded where they are, or to make their play less conspicuous to others.

If Problem VL Gamblers are looking for a luckier machine or location, then chances are they have lost money, but still have access to funds to chase their losses on a “luckier” machine. This moment, when their focus is away from the screen, may offer a good opportunity to encourage them think about “quitting” play for the day. If they can be shown that chasing losses does not work, and then are encouraged to realize as they walk out the door that they have a choice, it may be enough to deter some Problem Players from continuing to play, especially as it is this “continued play” which is likely to result in the most harm to them. Thus, the switching of locations is possibly the situation (trigger) leading to the most problematic play, but it may also represent an opportunity to get Problem Players to consider quitting for the day.

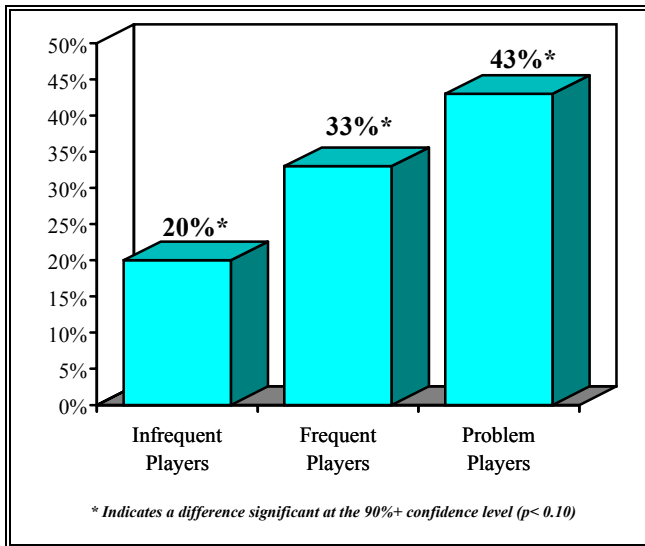
3.6.8 Average Number Of Times Played Per Visit

Problem Players are similarly likely to play more than once at a location each visit as Frequent Players (20% compared to 18%). In fact, the average number of times they play each visit is the same (1.3 to 1.4). However, **the Problem Players play for a much longer duration and are, therefore, spending more time at the machines without a break.**

3.6.9 VL Games Played

The most popular game by far for all segments is Swinging Bells (played by 75% to 89% of players in the last three months). Aces Fever, a poker game that is played on the Spielo machine which also has Swinging Bells, is also a preferred game for the Problem Players (21%) and the Frequent Players (16%), but is not as popular with Infrequent Players (8%). Problem Players (24%) and Frequent Players (18%) also prefer to play other poker games such as Joker Poker and Fever Poker, while Infrequent Players again play these types of games less often (13%). The other games (Lucky 7, Lucky 8-line, Red Hot 7's, Lotto 5-line, Blackjack, and the several variations of Keno) are all played by 5% or less of the players in these segments. **Given that Problem Players play Swinging Bells less often than the other segments, and that only 75% of them played the game at all in the last three months, the results suggests that many more Problem Players are playing the other games, in particular the poker games.**

Graph 3.6.9
Percent of Player Segments Playing a Poker Game in the Last Three Months

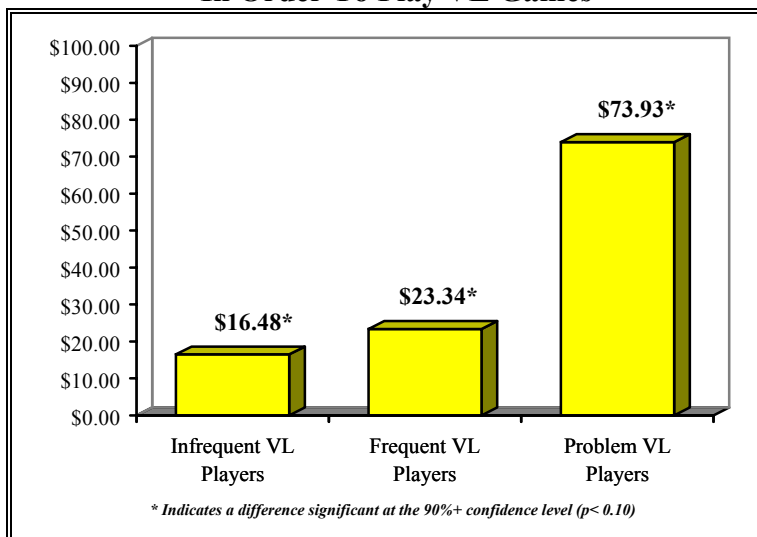


When players who played any VL poker game are identified, the Problem Players are more likely than Frequent Players to have played a VL poker game in the last three months (43% compared with 33%). This could be a result of the fact that Problem Players have been playing longer, and may have become bored with the Swinging Bells game and switched to poker. Whatever the reason, **it suggests that any measures undertaken to make the games less appealing to Problem Players (slowed play, payout change) will have to be done to line games and poker games in particular, in order to have any significant influence on problem play.**

3.6.10 Spending Behaviour

It has already been determined that Problem Players spend more money and spend more time playing VL games than the Frequent Players. This section of the report examines specific spending/play patterns that contribute to the higher expenditure.

Graph 3.6.10a
Average Amount Brought To A Location In Order To Play VL Games

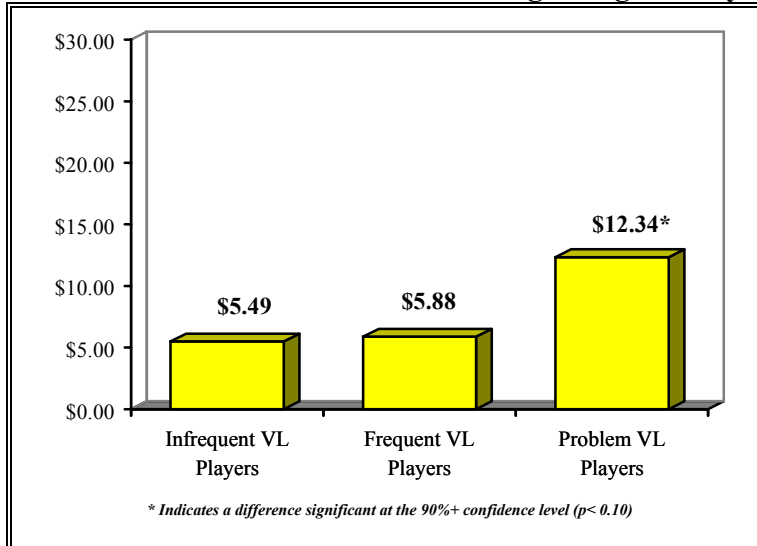


First of all, Problem VL Gamblers arrive at the location with substantially more money in their pocket to spend on VL play (\$73.93 compared to \$23.34 for Frequent Players and \$16.48 for Infrequent Players). With more money in their pockets, they can spend more on the games for a longer period of time. If they reduced the amount they brought to the location they would likely spend less.

One possible reason Problem Players bring more cash for VL play with them is that they are more likely to be going to the location specifically to play the machines. Whether the motivation is to “escape from problems” or to simply pass the time, these players typically spend a much longer time period at a machine than Frequent Players. They are aware, therefore, that they will need a larger amount of cash to be able to play for their “usual” duration. Frequent Players, on the other hand, are more inclined

to play VL games for entertainment purposes, for which they can more easily set a (smaller) budget.

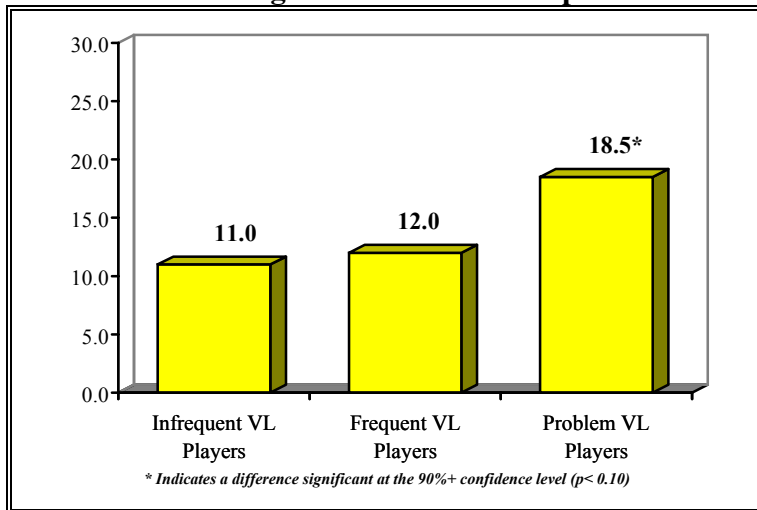
Graph 3.6.10b
Amount Put Into Machines At Beginning Of Play



A number of other factors likely contribute to the Problem Players' expenditures on VL gambling as well. **On average, they tend to put more money into the machines to begin play** (\$12.34 compared to \$5.88 for Frequent Players and \$5.49 for Infrequent Players). Problem Players have more money to spend and they intend to play for a longer period of time than Frequent Players. However, their play patterns (e.g., higher bet levels) also result in them spending their money at a faster rate than

Frequent Players.

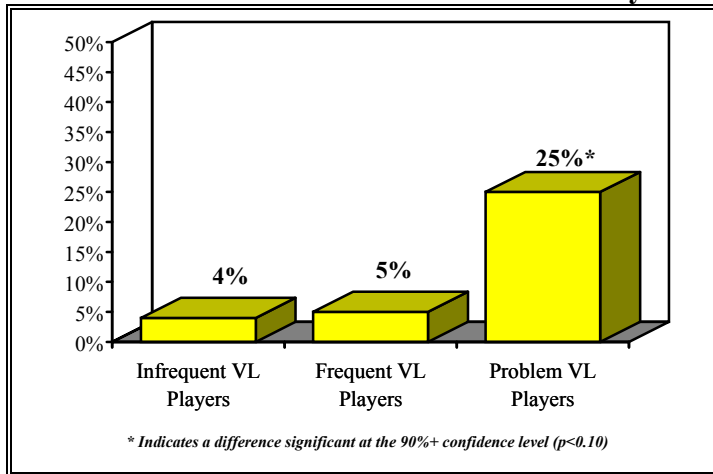
Graph 3.6.10c
Average Credit Level Per Spin



There is no difference in the value of a credit for Problem and Frequent VL Gamblers, with 91% to 93% betting nickel credits. However, **the Problem Players, as noted earlier, are far more likely to feel they can influence their chances of winning and, as a consequence, 84% feel they must have all bets covered when playing line games.** Comparatively, only 63% of Frequent Players feel they must cover all the bets when playing VL games like Swinging Bells. This perceived "need" to have all

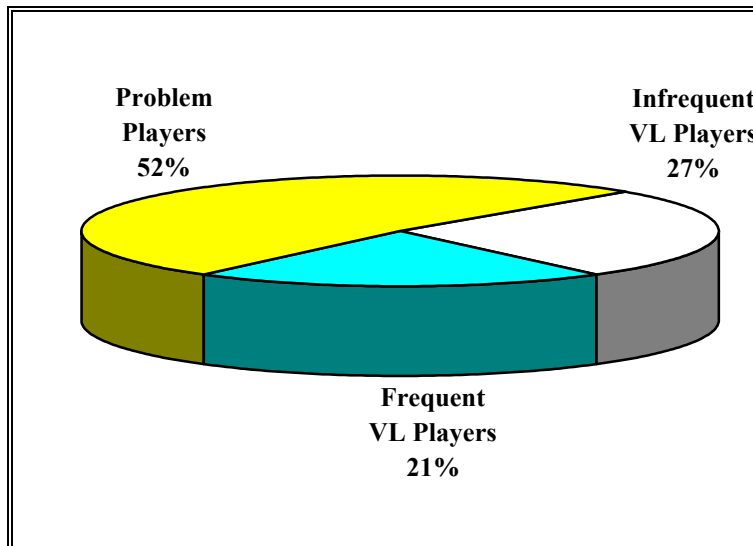
bets covered is likely a major reason why the average bet level and, thus, expenditure per play/spin are 50% higher for Problem Players (18.5 credits compared to 12.0 credits, and \$1.12 compared to \$0.71 per play/spin).

Graph 3.6.10d
Bet Maximum 50% Or More Of The Plays



Beyond merely covering the possible bets, one-quarter of Problem Players frequently ($\approx 50\%$ of the time) to almost always bet the maximum amount possible each play. This compares to only 5% of Frequent Players and 4% for Infrequent Players. **Given that only a small proportion of players who do not have a problem with VL gambling frequently bet the maximum, a reduction in the allowable maximum would primarily affect Problem Players.**

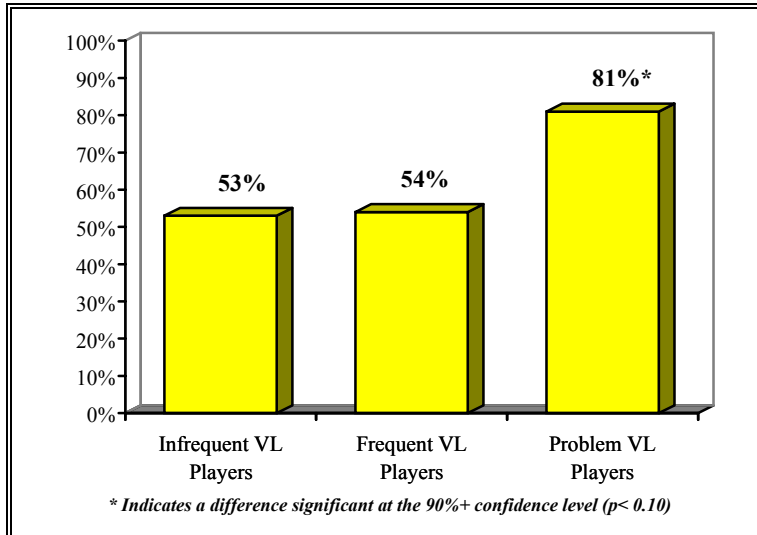
Graph 3.6.10e
Composition of All Players Who Play the Maximum Bet 50% of the Time or More



Another way to identify the potential impact of a reduction in the maximum bet level is to examine those players who bet the maximum on a frequent basis. The 8% of all VL gamblers who bet the maximum amount 50% or more of the times they play is comprised of 52% Problem Players, 21% Frequent Players and 27% Infrequent Players. Obviously then, **a reduction in the maximum bet level would have an impact on the 48% of maximum bet players who do not have a problem. However, half of those affected would be Problem VL Gamblers.** The

possible impact of such a control strategy, particularly for Problem Players, would best be determined in experimental conditions.

Graph 3.6.10f
Percentage Who Spend All The Money Brought To A Location At Least 50% Of The Time

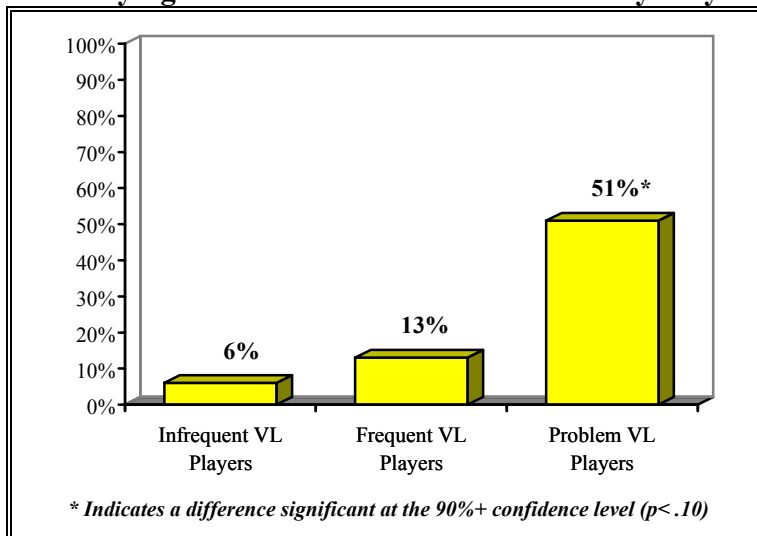


Close to half (48%) of Problem Players spend all the money that they brought to a location for VL play almost every time they play. Another 33% spend all of their VL money between 50% and 100% of the times they play. This means that, typically, 81% of Problem Players spend all of their VL money 50% of the time or more when playing VLT's, as compared to 53% to 54% for the other segments. **Thus, the Problem Players bring more money to play with, and are much more likely to spend it all.** This stand to reason, as for many Problem Players, their primary

motivation for going to a location is to play VL games. Therefore, it is likely that they would continue to play until the money they brought for this purpose is gone.

3.6.11 Sources of VL Money for Continued Play

Graph 3.6.11
Percentage Who Obtain More Money To Continue Playing 25% Or More Of The Times They Play



Unfortunately, 77% of Problem Players obtain more money in order to continue play on a given day, with 51% in this segment obtaining more money 25% or more of the times they play. This compares to only 13% for Frequent Players, and 6% for Infrequent Players. **Thus, Problem Players are more likely to play until they run out of money and then are more likely to obtain additional funds in order to continue to gamble on video lottery.**

Players can borrow money from others, get credit at the location, use their bank or credit card on location, or go off premises to obtain the needed cash for continued play.

A relatively small percentage of Problem VL Gamblers borrow money from others at a location occasionally (5%) or frequently (3%), in order to continue to play once their money runs out.

Comparatively, only 1% to 2% of those in the other non-problem VL player segments borrow at least occasionally.

Problem Players (28%) and Frequent Players (23%) report lending money occasionally or frequently to other players so that they can continue to play. Interestingly, the percentage of those lending money is much greater than for those borrowing. A segment profile of lenders and borrowers is presented below.

Segment Profile of Players Who Are at Least Occasionally Borrows and Lenders

	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Total (n=711)
Lender	6.1% ¹	8.7%	4.5%	19.3% ²
Borrower	0.6%	0.4%	1.4%	2.4%
Lender	31% ³	45%	23%	100%
Borrower	24%	18%	59%	100%

1. 6.1% of players are Infrequent Players who at least occasionally lend money to other players.
2. 19.3% of players at least occasionally lend money to other players.
3. 31% of those who lend money to other players at least occasionally are Infrequent Players.

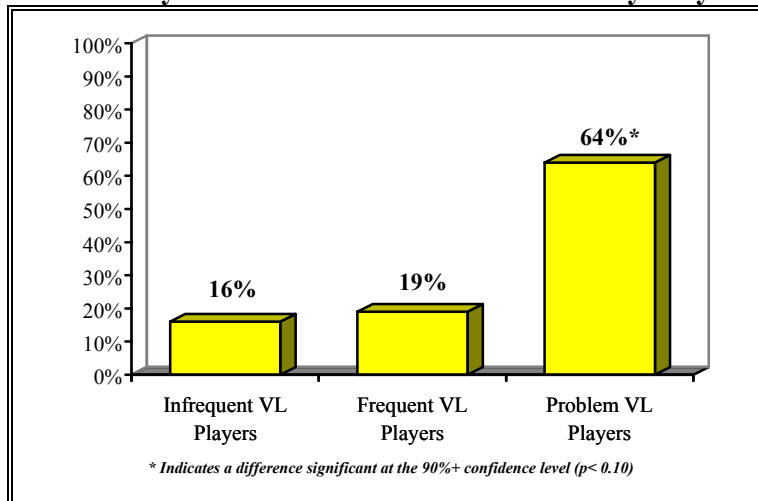
The 2.4% of players who borrow money at least occasionally are lent money by 19.3% of players (and possibly a pool of friends and acquaintances who may be at the location at time of need). The borrowers are mainly the Problem Players (59%), while 18% are Frequent Players and 24% are Infrequent Players. Given the higher expenditure level and more frequent play of Problem Players, as compared to the Infrequent Players, they probably account for much more than 59% of the money borrowed.

The process of borrowing money may be one of the main triggers of the guilt associated with the time and money spent on VL play. Furthermore, if Problem VL Gamblers are chasing their losses with the borrowed money, then the situation (in terms of guilt) will worsen as they lose the money borrowed. This issue will be discussed further in the section on the impact of VL play on Problem Players (see Section 3.9 - Impact Of Play).

3.6.12 Chasing Behaviour

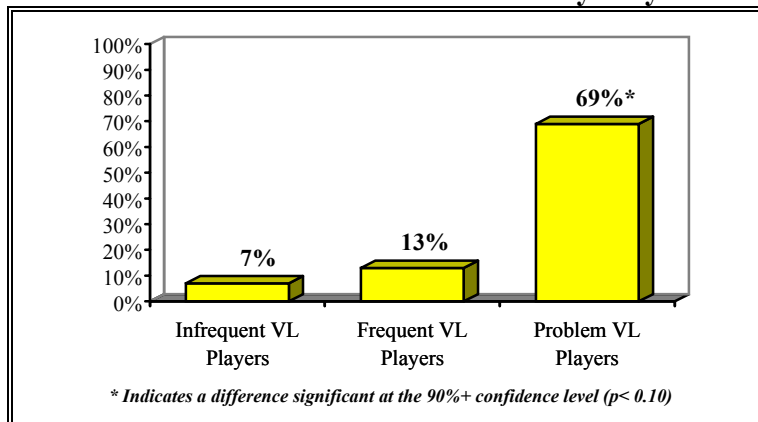
Two levels of chasing behaviour were examined: 1) increased, or continued expenditure in order to win back lost money while still at the machine; and 2) leaving the machine after a loss and then coming back at another time with more money, with the express intention of winning back the previous losses.

Graph 3.6.12a
Percentage Who Increase Bet Levels To Win Back Lost Money 25% Or More of The Times They Play



Chasing losses by increasing their bet level is a major contributor to problem play and is a significant distinguishing feature between Problem Players and the other segments. Sixty four percent of Problem Players increase their bet levels at least occasionally (25% of the time or more) compared to 16% - 19% of those in the other segments. In fact, only 20% of Problem Players say they never chase losses by betting at higher levels compared to 55% of Frequent Players and 69% of Infrequent Players.

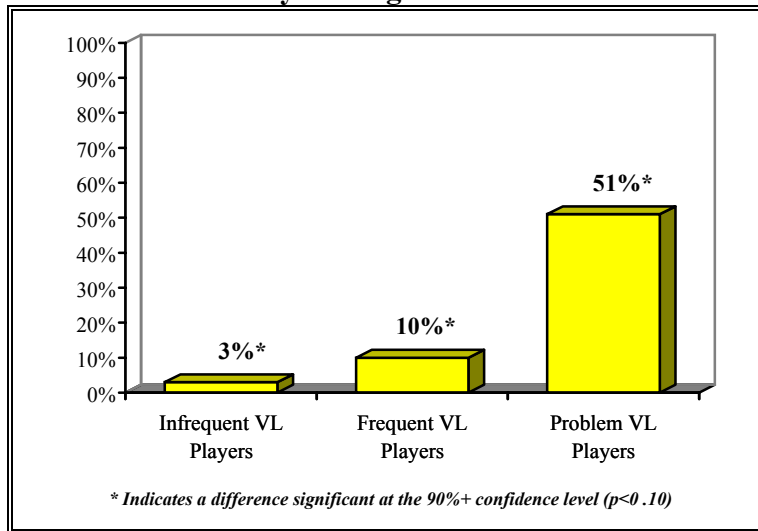
Graph 3.6.12b
Percentage Who Spend More Than Intended In Order To Win Back Losses 25% Or More of The Times They Play



Problem Players are also much more likely to indicate they exceed the amount of money they intended to spend in order to win back money they have lost (69% versus 13% for Frequent players and 7% for Infrequent Players). Presumably for Problem Players, access to cash at this point is critical to their continued play. This results in the borrowing of cash from friends and acquaintances, the use of credit cards, or taking advantage of credit available at the locations. Restricting access to cash in order

to chase losses then becomes a potentially strong deterrent to problem play.

Graph 3.6.12c
Percentage Who Have Chased Losses Later In The Day
Or The Next Day During The Last Three Months



Problem VL Gamblers also frequently chase their losses from to VL play on the following day, with 72% having returned another day to win back losses at least once during the last year, 51% within the last three months. Some Frequent Players also chase losses in this manner, but to a far lesser extent, with only 10% having done so within the last three months.

Sometimes Problem VL Gamblers are chasing losses from other forms of gambling, with 17% having chased other gambling losses through VL play within the last three months compared to 4%

of Frequent Players. Analysis of general gambling behaviours had found that Problem Players spend substantially more on casino slot machines than Frequent Players. This suggests that casino slot machines may be a primary source of losses from other gambling that is being chased on VL machines by Problem Players.

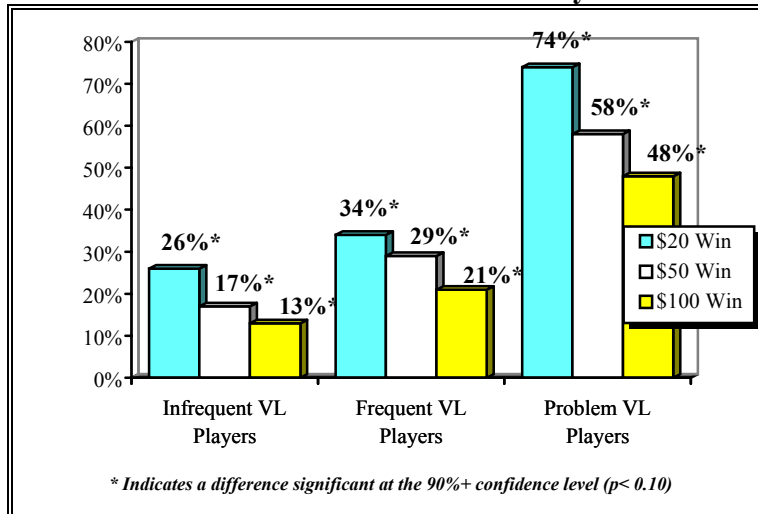
When the chasing for VL losses and other gambling losses are combined, 78% of Problem Players have ever chased losses from gambling compared to 21% of Frequent Players and 9% of Infrequent Players. This question, asked of players, will be highly effective in discriminating between Problem Players and those in the other segments.

The chasing behaviour may explain, in part, why Problem Players are more likely to be going to a location specifically to play VL games. Their goal is to win back money. Educating them as to the likelihood of winning back their losses may go a long way toward what is obviously a major determinant of their problem play. This kind of behaviour, perhaps fueled by the belief that after a string of losses they are more likely to win, magnifies the problem, as Problem Players will lose even *more* money while continuing to chase previously incurred gambling losses.

3.6.13 Reinvestment Behaviour (How Players Spend “Wins”)

One of the key factors leading to increased expenditure by players is what they will do with money they have won. Will they simply put it back into the machine, or will they spend it on other things? To examine this issue, respondents were asked what they would most likely do with a \$20.00, \$50.00 or \$100.00 win.

Graph 3.6.13
Percentage of Players Who Reinvest \$20, \$50
& \$100 Wins Into VL Play



Infrequent Players are least likely to spend any amount of their VL winnings on continued play (13% - 26%). The large majority pocket the cash (65% - 93%) or spend it on other things such as food or alcohol (31% - 59%).

Frequent Players are more likely to re-invest their winnings (21% - 34%), although the majority again will pocket the money (60% - 86%), or spend it on something else (36% - 55%).

In contrast, the Problem VL Gamblers are much more

likely to re-invest their winnings. Nearly three-quarters (74%) will reinvest a \$20.00 win; 58% a \$50.00 win; and 48% will continue to play with a \$100.00 win. They are equally likely to spend their winnings on alcohol as those in the other two segments (15% - 28%), but less likely to spend it on something else (13% - 15% compared to 23% - 28% of Frequent Players). This is consistent with the profile of Frequent Players who go to these locations to do more than just play VL games and, thus, these players would have something else on which to spend their winnings. Problem Players, on the other hand, are more inclined to go to a location primarily to play VL games and, therefore, aside from alcohol which is available at all VL locations, they have fewer attractive activities on-site to spend their winning money on other than the VL machines.

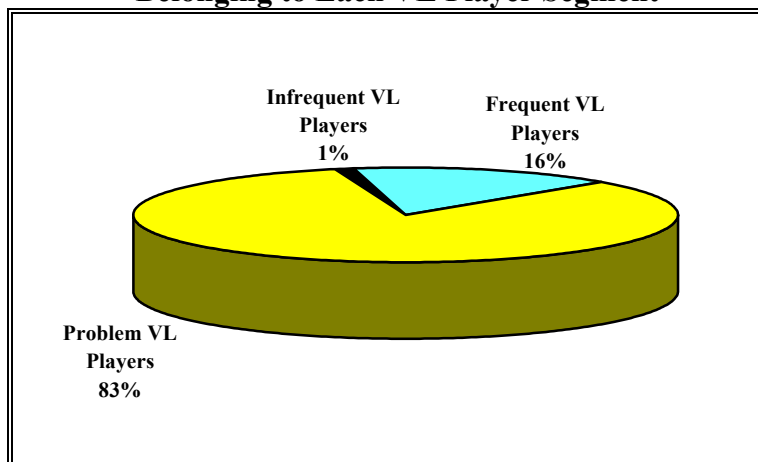
The fact that 48% to 74% of Problem Players will reinvest their winnings into the VL games means that the money paid out to these players in particular may be lower than the average of 72% of total VLT wagers typically paid out as prizes. (Source: Nova Scotia Alcohol & Gaming Authority 1996-97 Annual Gaming Report.) (If this is true, and given that Problem Players account for 55% of VL revenue, then it is possible that the Infrequent and Frequent Players are taking out more than the 72% of credits that are paid out, on average. They may, in fact, be much closer to breaking even than the Problem Players and, thus, gain more financial reward from their play.) This suggests that, if the Problem Players do not adopt stopping behaviours, perhaps encouragement to play “smarter” (i.e., not reinvest their winnings) may be beneficial.

One reason Problem players will be more likely to reinvest their winnings, particularly if they win early on during their play, is they have fewer other things to do at the location, and they had likely planned to spend substantially more time playing. Rather than quitting at a credit level at which they would normally cash out (after playing for a more typical time period), they would be more likely to continue playing and, as likely as not, watch the number of credits decline. Other players, who are primarily at a VL location to enjoy themselves, socialize, or “have a good time” would be more likely to cash out, quit playing, and either spend the money on other activities on-

site, or pocket it. Focusing on what Problem Players can do to quit while they are ahead, particularly if they win right away, may be a key factor in reducing their problem play.

3.6.14 Jamming the Machines

Graph 3.6.14
Percentage of Players Who “Jam” Machines
Belonging to Each VL Player Segment



Problem Players are much more likely to jam machines on so that they play automatically (39% compared to 21% for Frequent Players). Almost one-quarter (24%) of Problem Players jam the machines 25% or more of the times they play compared to 14% of Frequent Players. Due to the fact that Problem Players play longer, and because they are more likely to jam machines, it is estimated that when considering all players who are observed jamming a machine, 83% will be Problem

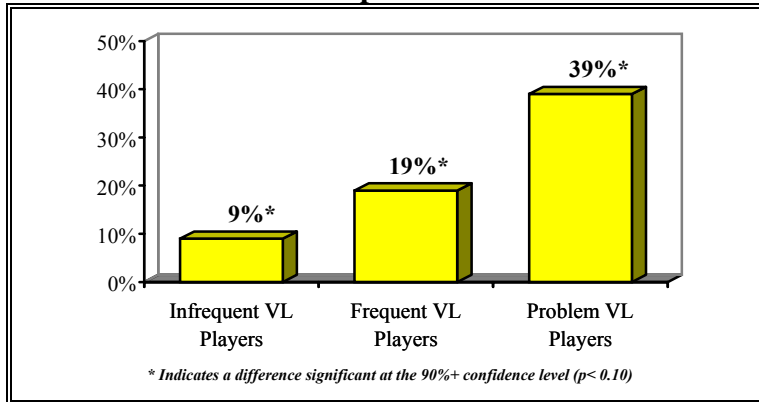
Players, 16% will be Frequent Players and 1% Infrequent Players. Again, this behaviour alone is an effective identifier of Problem Players.

One control measure may be to alter the design of the machines such that they cannot be jammed. Obviously, for the 39% of Problem Players who jam the machines, this would make the play of VL more demanding of their attention and, to a small extent, a more physical activity. This may help to reduce the amount of time and/or money these players allocate to VL gambling. Greater involvement in play could be more gratifying for some players or, conversely, they may become “bored” if they must remain at the machine to continue playing. Some players who jam the machines on do so in order to participate in other activities at the same time. If jamming the buttons is not an alternative, these players may choose to participate in these other activities instead of continuous gambling, thereby reducing the length of time and the amount of money spent on the machines.

Experimentation could be conducted to help determine the impact of eliminating jamming play.

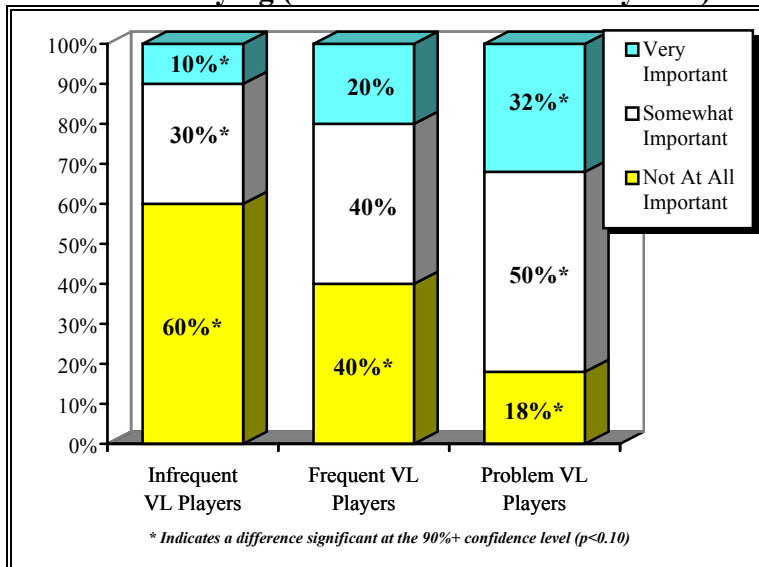
3.6.15 Attempts To Improve Chances Of Winning

Graph 3.6.15a
Percentage of Players Who Play Particular Machines To Improve Luck



two primary tactics used to increase winnings: changing bet levels (12% compared to 6% for Frequent Players) and the use of the stop button (10% compared to 5% for Frequent Players).

Graph 3.6.15b
Importance Of Using A System To Improve Luck When Playing (For Those Who Use A System)



The first thing many VL gamblers are likely to do in order to “improve their luck” is to play a particular machine they feel is lucky. Problem Players (39%) are more likely to do this than Frequent Players (19%) and Infrequent Players (9%). Problem Players are also more likely to do something while playing in order to improve their chances of winning (28% compared to 15% for Frequent Players and 10% for Infrequent Players). There are

Problem VL Players are most likely to consider their “strategy” or tactic to improve their luck as important (somewhat or very important: 82% of Problem Players versus 60% of Frequent Players). In fact, only 18% of those Problem VL Gamblers who employ some kind of system to improve their luck, believe it is not at all important to use the system when they play VL games.

Some players also differentiate between “systems” designed to improve luck and superstitious actions or rituals used when playing. **Fewer Problem Players report using superstitious**

rituals than “tried and true” systems (16% compared to 28%), although there is a great deal of overlap between systems and superstitions reported by these players. There is, in fact, a wide variety of superstitions for VL players, or rituals, they will “perform” when playing the games, ranging from changing bet levels (e.g., using a specific sequence of bets) or using the stop button to rubbing the machine, chanting or even praying.

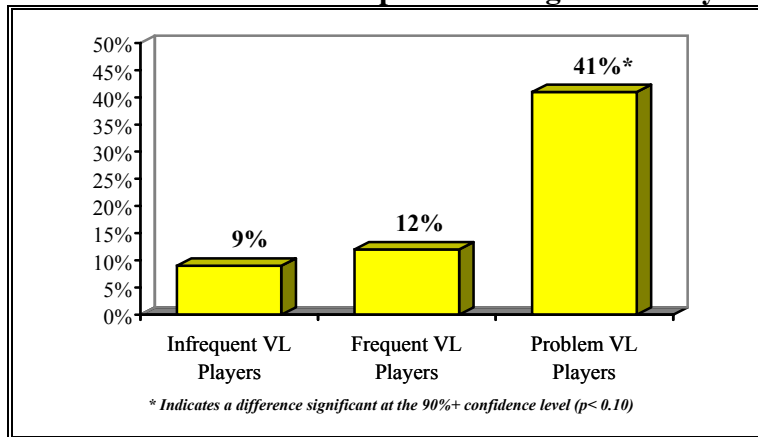
Describing these actions as superstitious or rituals implies that the players are unlikely to believe that such actions will actually influence the outcome of their play. However, the “systems” used

may be a manifestation of Problem Players' belief that they can influence their odds of winning, especially considering how important these tactics are to those who use them. Reducing these beliefs, perhaps through education or reinforcement as to the randomness of wins, may help to change problematic behaviour for these players.

3.6.16 People Watching Players Gamble

There is a substantial difference between Problem Players and the other two player segments when it comes to feeling uncomfortable because other people are watching them play. Problem Players are much more likely to feel uncomfortable at all (57% compared to 27% for Frequent Players, 20% of Infrequent Players), and 41% of them feel uncomfortable 25% or more of the times they play compared to 12% of Frequent Players.

Graph 3.6.16
Percentage Of Players Who Are Uncomfortable
25% Or More Of The Times They Play
Because Of Other People Watching Them Play



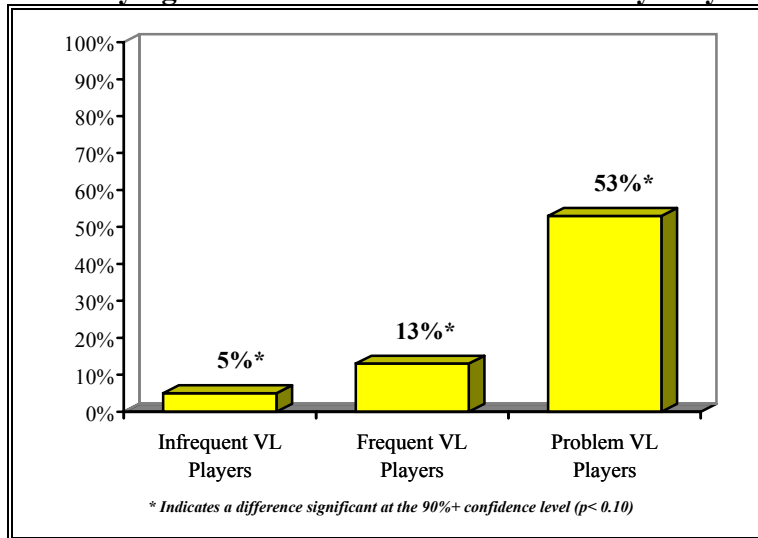
The Problem VL Gamblers are, therefore, more likely to select playing locations and times when they can't be observed playing. This helps to explain why they may be playing in locations during the afternoons when business is slow and the establishments are not as full of people (potential spectators). They will also be more likely to seek locations that offer less opportunity to be watched, either because they do not tend to be as crowded, such as sports establishments, or locations that

have specific areas away from or out of sight of other people. As noted earlier, this may also be one of the reasons they are likely to move to alternate locations in a single day to continue play.

Problem Players make up the majority of gamblers at the machines for most of the day. It is reasonable, therefore, that management at these locations would become aware of players' desire for privacy and may construct separate or secluded gambling or casino areas. However, by raising the comfort level for players in this manner, the managers may be contributing to their problem gambling. At the location level, managers know a separate gambling area should attract and keep gamblers playing at the location. At the societal level, this may not be beneficial, as these separate gambling areas may be seen to contribute to problem VL gambling behaviours.

3.6.17 Losing Track of Time

Graph 3.6.17
Percentage Who Lose Track Of Time While
Playing 25% Or More Of The Times They Play



Problem Players are much more likely to have lost track of time while playing VL games in the previous three months (75% compared to 30% for Frequent Players and only 17% for Infrequent Players). This happens at least 25% of the time for 53% of the Problem Players compared to 13% for Frequent Players and 5% for Infrequent Players. It is difficult to determine whether losing track of time is a cause or an effect of problem play. It is easy to see how players can become mesmerized by the game and lose track of time. As some players

are playing to escape from situations at home or work, their *goal* may be to lose track of time to help time pass quickly, or to avoid confronting problems or unpleasant situations.

Section 3.10 - Coping Mechanisms examines the relative success of various actions and strategies VL players have undertaken to control their play. If VL players are not already focusing on controlling the time they spend on VL gambling, then it may be useful to try to provide them with mechanisms aimed at helping to control the amount of time they spend in front of the machines. For example, a timer or a built-in clock with a count-down alarm appearing on play screens may encourage players to keep track of time and use defined time periods for play as a stopping rule.

3.6.18 Sitting/Standing During Play

Whether players stand or sit while playing was measured as a potential identifier and as a potential facilitator of extended play hypothesized to be associated with problem VL gambling. Frequent and Problem Players are equally likely to sit (71% to 73%) or stand (18% to 23%) while playing or alternate between sitting and standing (6% to 9%). It is only the Infrequent Players who are more likely to be standing when they play (32% compared to 18% to 23%). Therefore, whether players sit or stand does not appear to distinguish between the two heavy player segments and does not appear to have an influence on extended play.

3.6.19 Social Interaction While Gambling

Social interaction while playing VL machines, whether Problem Players play alone or with friends or acquaintances, is potentially an important factor in efforts to control problem play. It was hypothesized that Problem VL Players would be more likely to play alone, avoiding social interaction because of their “problem.” However, if there is social interaction during play, then

there is the opportunity for friends or acquaintances to help the player control their gambling at a time when help could be most effective (i.e., during play). A simple “it’s time for us to go,” or “let’s play pool now,” could be a trigger for realization of the amount of time spent playing and, consequently, a motivation to stop playing at that moment.

A large percentage of both the Problem Players (41%) and Frequent Players (46%) play VL games **on the same machine** with friends or acquaintances at least one-quarter of the time they play. Just over half are also likely to play at least 25% of the time with a friend or acquaintance **on a nearby machine** (51% to 57%). This illustrates that for many Problem Players, VL play is a social activity and that the opportunity may be there for a “friends don’t let friends drive drunk” type of strategy. Obviously, this would be a sensitive issue and friends may be unwilling (i.e., not motivated) or unable to influence their friend or acquaintance to control their play. However, this also tended to be the case when the Drinking & Driving campaigns were first initiated. As the “community at large” is made more aware of the effects of “over gambling,” it may become more socially acceptable to intervene on a grass roots level, provided the initial position is supported through an organized campaign. Taking advantage of this factor would require an innovative approach.


The results suggest that Problem Players seem to want to control their play and, thus, may be willing partners in such an approach. It may be worthwhile to explore the response of Problem VL Gamblers and associated friends/acquaintances towards this concept in in-depth discussion groups or other additional research.

3.6.20 Quitting Behaviour

It was noted Section 3.3.5 - Perceived Ability To Stop that 75% of Problem VL Players indicate they sometimes find it hard to stop playing, compared to only 9% of Frequent Players. Their inability to stop is, therefore, a major contributor to the problems they face with VL gambling. Further questions dealt with the player’s ability to stop in specific situations. It is not surprising to find that Problem VL Players tend to have more difficulty stopping under any circumstances.

Figure 3.6.20
Differences In Quitting Behaviours By Player Segment

	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference – Frequent & Problem Players
Have trouble quitting while ahead	5%	7%	52%	45%
Spend all the money they brought to a location for VL play	53%	54%	81%	27%
Get more money to continue VL play that day	1%	2%	25%	23%
Continue as long as they have any money left	6%	12%	52%	40%
Continue after they have spent all the money they intended to spend on VL play	----	3%	43%	40%

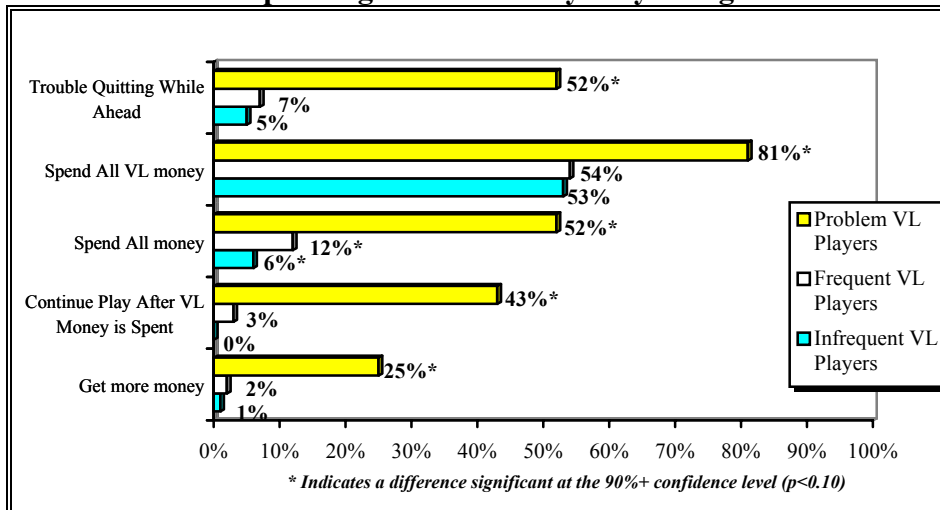
 - indicates differences significant at the 90%+ confidence level ($p < .10$)

Fifty-two percent of Problem Players say they frequently or always have trouble quitting while they are ahead compared to 5%-7% for the other player segments. This is likely due

to the fact that they set their notion of what constitutes “a win” at a much higher level. They therefore continue to play while ahead in order to achieve their goal. Unfortunately, their chances of reaching their goal in a given game are less, and they are therefore more likely to find themselves in a losing position later in their play. If they are less likely to quit while they are ahead (in the true sense), they are more likely to find themselves in a loss situation with continued play and, as a consequence, spend all their cash. As predicted, Problem Players are more likely (81%) to keep playing until they have spent all of the money they brought to a location for VL play compared to 53%-54% for the other segments. Problem Players are also much more inclined to frequently or always continue playing until they have no money left to spend (52% compared to 6%-12% for the other segments).

Not only are Problem Players much more likely to spend all of the money they brought for VL play, they are much more likely to continue to play once these funds are gone. Forty-three percent (43%) of Problem Players frequently or always continue to play after they spent their intended amount on VL games compared to 3% or less of those in the other segments. The fact that they had money allocated for VL play suggests they had a budget in mind when they began to play, but continue to gamble after they have spent their budget. Some of these players still have money (not originally intended for VL play) in their pockets, but 25% of Problem Players frequently or always have to get more money in order to continue playing compared to only 1% - 2% of those in the other segments.

**Graph 3.6.20
Overspending Behaviours By Player Segment**



For Problem Players, therefore, it is a progression of decision points that brings them to a position of overspending. They often won't quit while ahead, they are very likely to continue to play until they have spent the money they brought to a

location specifically for VL play, they may then spend all of the money they have in their pockets, and some of them frequently go to get more money to continue to play that day. Understanding why they do stop, and identifying reasons why Frequent Players stop in comparison to Problem Players may provide insight into why Problem Players have difficulty stopping, and suggest strategies for helping them change their play and, thus, their overspending behaviours.


3.6.21 Reasons for Stopping

Players were asked to indicate how often they stopped playing VL machines for a list of specific reasons. For each reason measured, they indicated whether they never (0% of the times they

play), rarely (less than 25% of the time), occasionally (25% - 50% of the time), frequently (50% or more of the time) or almost always ($\approx 100\%$ of the time) stopped playing VLT's. The table below indicates the percent of players in each segment that stopped frequently or almost always for a particular reason. The reasons are grouped into four categories: self imposed limits, internal factors (bored/distracted), external factors, and resources depleted.

Reasons for Stopping

	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference: Frequent & Problem Players
Self Imposed Limits:				
Spent Budgeted Amount	73%	74%	63%	-11%
Hit a Certain Credit Level	53%	53%	39%	-14%
Spent Planned Amount of Time Playing	28%	37%	31%	----
Ran Out of Credits on the Machine	75%	67%	66%	----
Internal Factors:				
Lost Interest, Got Bored	27%	22%	15%	-7%
Decided to Play Pool or Dance	17%	19%	13%	----
Decided to Eat or Drink	19%	12%	14%	----
External Factors:				
Friends or Family Arrived to Socialize	20%	19%	21%	----
Friends or Family Are Leaving	17%	15%	15%	----
Gave Someone Else a Chance to Play	10%	8%	9%	----
Resources Depleted:				
Spent All Cash Available	19%	26%	65%	39%
Location/Establishment Closing	3%	7%	25%	18%

 - indicates differences significant at the 90%+ confidence level ($p < .10$)

Problem Players are less likely to stop because of a self imposed limit. They are less likely to stop because they had spent their budget (63% compared to 73%-74% for the other segments) or because they reached a specific credit level (39% compared to 53% for the other segments). Despite the fact that they stop less often because they have spent their budget, this is still one of the three main reasons why Problem Players stop playing VLT's. Therefore, budgeting of VL expenditure does have some value for these people.

The fact that Problem Players are less likely to stop because they reached a specific credit level was previously discussed (Section 3.6.20 - Quitting Behaviour). The problem for these players is they likely set higher goals for desired credit levels and therefore are less likely to reach them. It is also likely that many are there to pass time, and no matter how much they win, they will not leave until stopping is imposed upon them for some other reason.

Players in all three segments have time budgets and Problem Players (31%) are just as likely as Frequent Players (38%) to quit because they had spent their planned amount of time playing. Thus it appears that while Problem Players are less likely to stop because of self imposed limits, such limits are still very often set, and do result in the cessation of play. However, these numbers mask a significant difference between the Frequent and Problem

Players as to how they set these limits. Problem Players' expectations and their perceptions of acceptable behaviour are very different and contribute to difficulties in stopping play. They *expect* they can win and they feel it is reasonable for a person to play for hours.

The arrival (19% - 21%) and departure (15% - 17%) of friends and family has a similar impact on all Regular VL Players in terms of stopping their play. However, given that Problem VL Gamblers play more often and for longer periods of time, there is greater opportunity for friends and family members to intervene in the on-going play of these adults. In some cases, the underlying motives for stopping play due to the arrival of friends and especially family will differ among the three player segments (e.g., Infrequent and Frequent Players may stop playing in order to socialize, whereas Problem VL Gamblers may stop in order to hide their play from significant others and/or to avoid arguments/confrontations). Regardless, approximately 21% of Problem VL Players frequently or always stop their play in response to friends or family and, thus, there is potential for these individuals to play an even larger role in helping Problem Players regulate their play.

Regrettably, the majority (65%) of Problem VL Gamblers usually stop playing because they have exhausted their available resources. They are almost three times more likely to cite this reason for stopping than either Frequent (26%) or Infrequent Players (19%). Furthermore, **25% of Problem VL Gamblers are frequently forced to stop playing by the location closing.** While this reason for stopping is cited less often than other budget related limits, it exceeds the influence of internal events in precipitating quitting behaviour and is reported significantly more often by Problem VL Gamblers than by players in the other segments (25% versus 3% - 7%).

It appears that despite the extended amounts of time Problem VL Gamblers devote to playing the games, the reasons they finally stop playing each time are largely unrelated to boredom, fatigue with playing VLT's or a desire to move on to another activity. While self-imposed limits such as budgeting are the primary control mechanisms used by all Regular Players, Problem VL Gamblers use this strategy less often, have significantly higher budgets when they do set limits and, ultimately, two-thirds only stop when they have spent all their available cash.

Figure 3.6.21b
Cash Out Behaviour

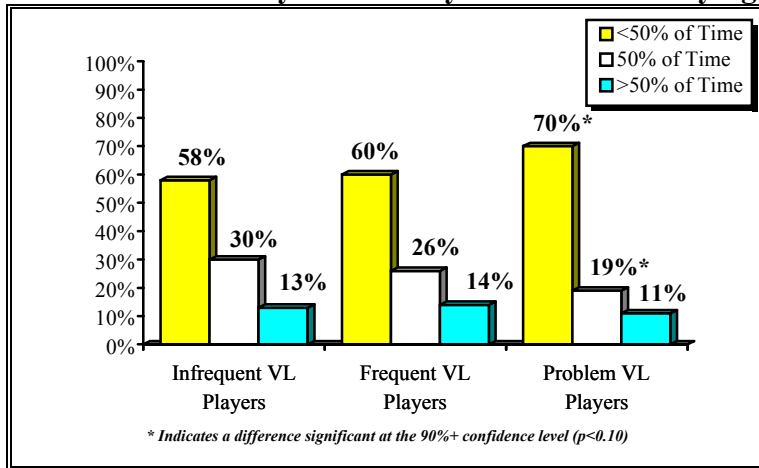
	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference: Frequent & Problem Players
% Who Cash out and then continue to play	10%	27%	50%	23%
Average amount at which they cash out	\$24.13	\$37.56	\$80.50	\$42.94

■ - indicates differences significant at the 90%+ confidence level ($p < .10$)

The motives and play strategies for Frequent and Problem Players are quite different. The entertainment value of play desired by Frequent Players should lead them to be satisfied with taking home a much smaller win. This means they would be more likely to cash out when they have reached a desired or satisfactory credit level and they would be less likely to continue play after cashing out. This is, in fact, what happens, with 50% of Problem Players frequently or always cashing out and then continuing to play compared to 27% of Frequent Players and 10% of Infrequent Players. Frequent and Infrequent Players also tend to cash out at much lower levels (\$37.56 and \$24.13 for Frequent and Infrequent Players compared to \$80.50 for Problem Players) which they will reach sooner than Problem Players. The likely result of this play behaviour is that Problem Players will lose more often, going for the “big win.” The results of this behaviour will be discussed in Section 3.7 - VL Gambling Outcomes.

3.7 VL Gambling Outcomes

Graph 3.7a
Percentage Of Time Players Feel They Are Up Any Amount Of Money When They Are Finished Playing

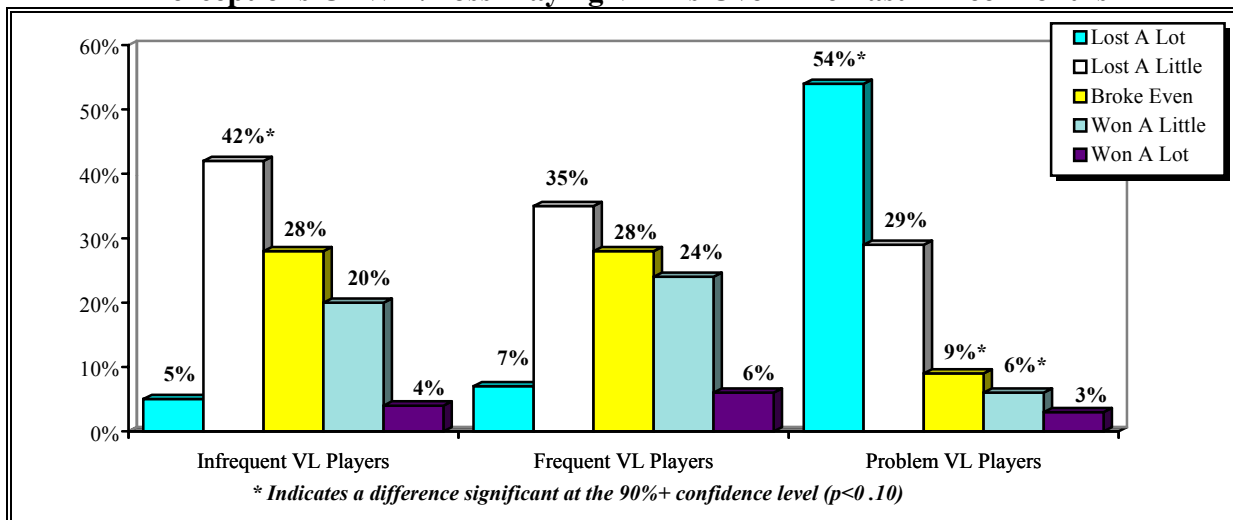


Most players recognize that, generally, more often than not they lose money playing VLT's. Problem VL Gamblers (70%) are more likely to believe this than Frequent (60%) and Infrequent (58%) Players. Only 11% to 14% of any VLT Players believe they are up any amount of money more than half of the times they play.

When the frequency of "quitting when ahead" is averaged, Problem VL Gamblers estimate they are up less often (31% of the

time) than do the other regular players (38% - 39%). It is highly likely that the perceptions of Problem Players in this regard reflect the actual effects of their play behaviour. As discussed previously, Problem Players play longer and are much less likely to quit while ahead. The end result is that their total cash loss, that is the amount of the out-of-pocket money initially invested in play that ends up as losses, would be greater for the Problem Player segment than for those in the other segments. Thus, Problem VL Gamblers would be more likely to be in a loss position when they "quit" or stop playing each time and, consequently, they lose a greater share of the money they spend out-of-pocket on VL gambling, as compared to other Regular VL Players.

Graph 3.7b
Perceptions Of Win/Loss Playing VLT's Over The Past Three Months



The fact that Problem VL Gamblers typically bring more money to spend on VL play each time they play, and are more likely to be in a loss position when they finish playing, would lead to the conclusion that they should lose more money than other Regular VL Players in a given time

period (i.e., three months). Problem VL Players report this is the case, with 54% saying that over the last three months, they had “lost a lot” when playing the machines compared to 5% to 7% for the other segments. Conversely, only 9% of Problem VL Players feel they broke even compared to 28% for the other segments, and 6% feel they won a little compared to 20% to 24% for the other segments.

The average amount estimated as lost over the previous three months (by those indicating they had lost “a little” or “a lot”) is substantially higher for Problem Players (\$1,164.90) compared to Frequent Players (\$176.54) and Infrequent Players (\$62.31). Not surprisingly, those Problem Players who win also tend to win greater amounts (\$1,590.00 compared to \$651.20 for Frequent Players and \$202.96 for Infrequent Players). However, there are significantly **fewer Problem Players (9%) who have won over the last three months compared to Frequent (30%) and Infrequent (24%) Players.**

It is these losses, in part, that result in these Regular VL Players being Problem Players. It is interesting to note that 18% state they broke even or won over the last three months, but still are classified as Problem Players. This suggests that the necessary investment of time and/or money made by these players to achieve their “wins” is problematic for them.

Problem Players are also more likely to have had a large win at some time in their VL gambling history, averaging \$650.63 for the largest amount ever won compared to \$358.45 for Frequent Players and \$211.95 for Infrequent Players. This is not particularly surprising given the longer periods of play and higher betting levels for these players.

It is clear from these results that Problem VL Players are aware of their losses. However, most have experienced a big win in their past and, given their play behaviour (e.g., bet levels), when they win, they win more. The issue is, how do these outcomes influence their behaviours and beliefs? **It appears that recognition of the fact that they have lost in the past does not influence the attitudes of many Problem VL Gamblers concerning their future chances of winning.** As noted in Section 3.3 (Attitudes & Motivates Towards VL Gambling), Problem VL Players are more likely to feel they are going to win when they start to play. They hold this belief despite their past failures to win.

There are two possible causes of this anomaly:

- **Problem Players rely on superstitious behaviour to change their luck.** As long as they believe they can influence the outcome of the game by selecting specific machines to play or changing their bet levels, they will feel they can overcome these losses;
- **whether they win or lose is not a major motivation to play.** For these players it is the experience of playing that drives them to the machines. To justify their behaviour to themselves, they have to believe their luck will change and that they will likely win the next time they play.

It has been noted in the Play Behaviours section of this report (Section 3.6 Video Lottery Play Behaviour) that educating Problem Players concerning the odds of winning might help them to manage their problem play. The results regarding VL gambling outcomes (i.e., wins/losses) reinforces that conclusion and also provides insight as to the information that should be

effectively communicated to these Problem Players. Informing them that extended VL play will lead to substantial losses will simply be telling them something they already know. Educating them on the chances they will win in the future, and allowing them to participate in determining the ineffectiveness of superstitious behaviour in influencing that future, may be more effective.

If attitudes and beliefs cannot be changed based on experience (outcomes of VL play) and education, then it may be necessary to change the games themselves. There have been several suggestions put forth in various jurisdictions in Canada such as slowing down the pace of the games so that it is more difficult to lose money quickly, reducing and/or increasing payouts, or changing the maximum bet. Whatever steps are contemplated, they should take into account the specific play characteristics of the Problem Players so that the effects are felt most by these players. Specifically, Problem Players exhibit extended play periods, cover all bets, more often play at maximum bet levels, play at specific times, and on specific days of the week.

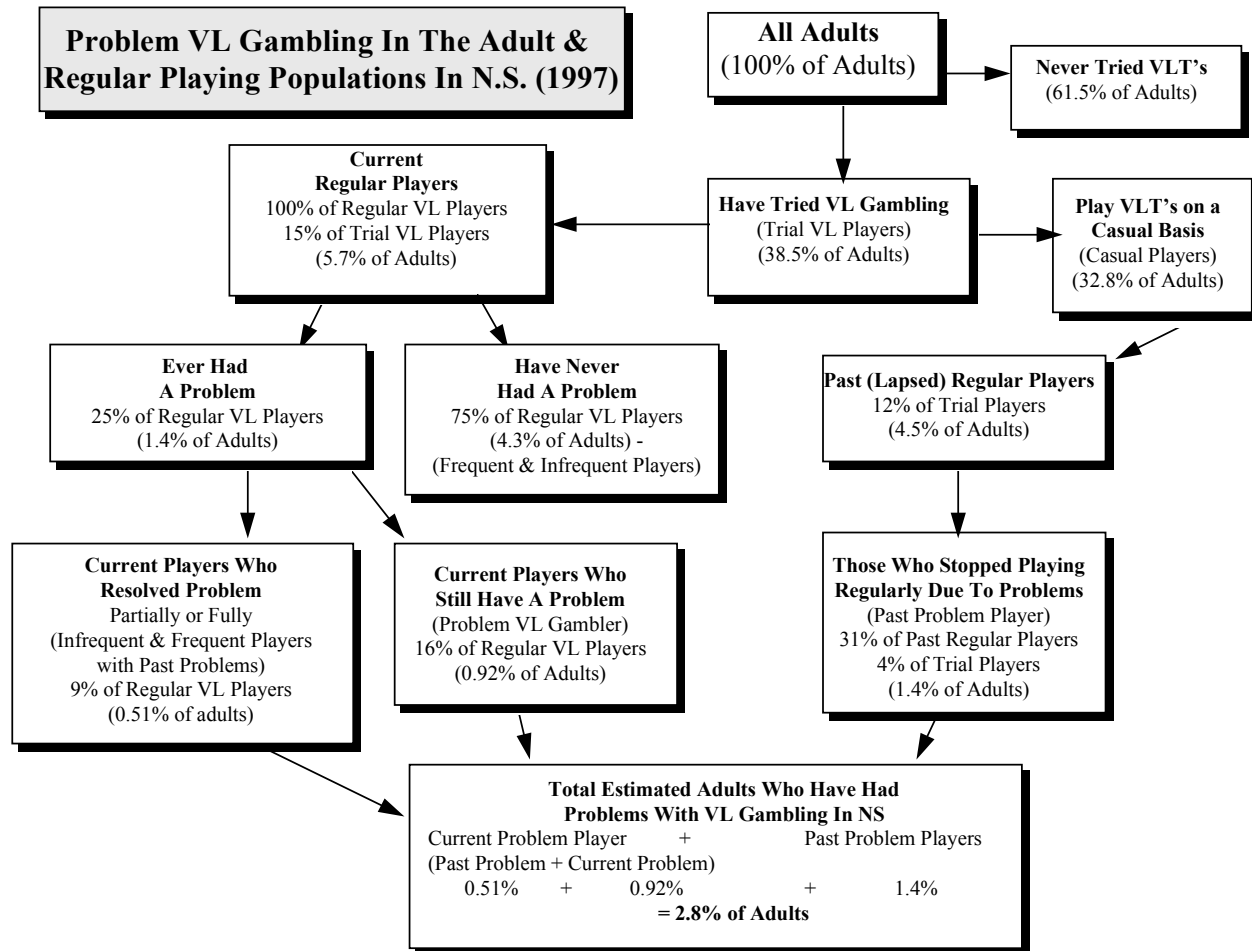
Another outcome these losses engender is “chasing” behaviour. Problem VL Gamblers tend to lose more, and more often so that the opportunity for chasing losses occurs more frequently. This reinforces the need to control the factors that lead to or support chasing of losses (e.g., belief their odds of winning are better after losing, their ability to obtain cash in order to chase losses), in order to minimize the negative effects of these losses on their behaviour.

In summary, Problem Players lose more often than other Regular Players, and they are aware of this. This means that a disproportionate amount of their “out-of-pocket” money is being lost playing the VL games. However, the mere fact that, on average, they lose money does not lead to changes in their behaviour.

Efforts, therefore, need to be focused on reducing the perceived value of superstitious behaviour, limiting their perceived ability to influence the outcome of their play, changing the perceptions about the odds of winning after a loss, and reducing the factors that lead to, and facilitate, their chasing of losses after they lose.

3.8 Player Perceptions Of Problem Behaviour (Table 3.8 - Appendix D)

3.8.1 Problem Gambling In The Adult & Regular Playing Populations



The above diagram illustrates the current playing patterns for video lottery in Nova Scotia based on the combined results of the Regular VL Players Survey and the General Population Survey.

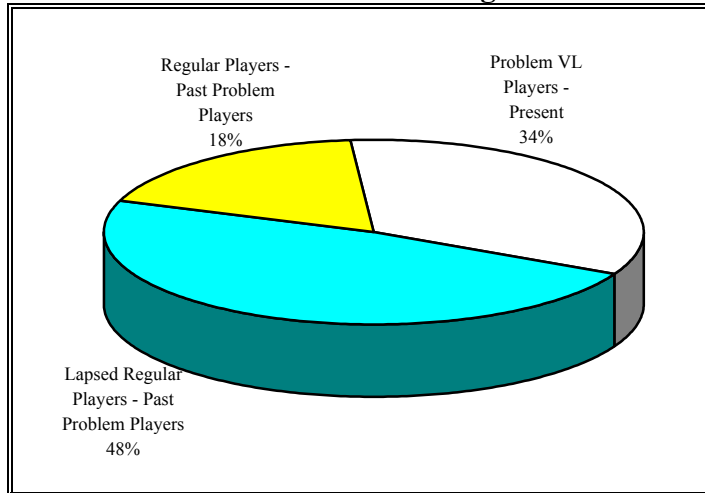
To estimate the extent to which video lottery play is associated with problem VL gambling in the province of Nova Scotia, those experiencing both current and past problems are considered. Three groups were identified and used to derive the estimate:

1. Current Problem Gamblers (0.92% of Adults)
 - those who are currently playing video lottery on a regular monthly basis and are categorized as Problem VL Gamblers.
2. Current Past Problem VL Gamblers (0.51% of Adults)
 - those who are currently playing video lottery on a regular monthly basis and, in the past, have experienced problems (self-declared) with VL gambling which they have since resolved.
3. Lapsed Past Problem Players (1.4% of Adults)

- those who in the past played video lottery on a regular monthly basis and stopped playing regularly due to problems associated with their play (self-declared problem gamblers).

Based on these results, the estimate of problem VL gambling, past and present, would be approximately 2.8%, or approximately 19,000 adults in Nova Scotia, who at some time have been personally involved in problem VL play.

**Graph 3.8.1
Breakdown Of Past &
Present Problem VL Segments**



The breakdown of past and present Problem VL Players is not exact and represents a “rough estimate.” The estimate of 1.4% of adults as Lapsed Problem Players has a confidence interval of $\pm 0.96\%$ at the 90% confidence interval, and a coefficient of variation of 42% (compared to 12% and 8% for the other two Problem Player estimates). Regardless, **it is reasonable to assume that a large percentage of those who have ever had a problem with VL gambling are now Lapsed Problem Players for whom (at the time of the survey) stopping VL play was a successful solution.** However, many of these

people, particularly those who have stopped playing in the last two years, may be susceptible to resuming their problem VL gambling and should be targeted for on-going support. It appears that for a smaller proportion, controlled or managed play is also a successful resolution for problem VL gambling, although this group may also require additional support to avoid relapse.

3.8.2 Problem Profile Of Player Segments

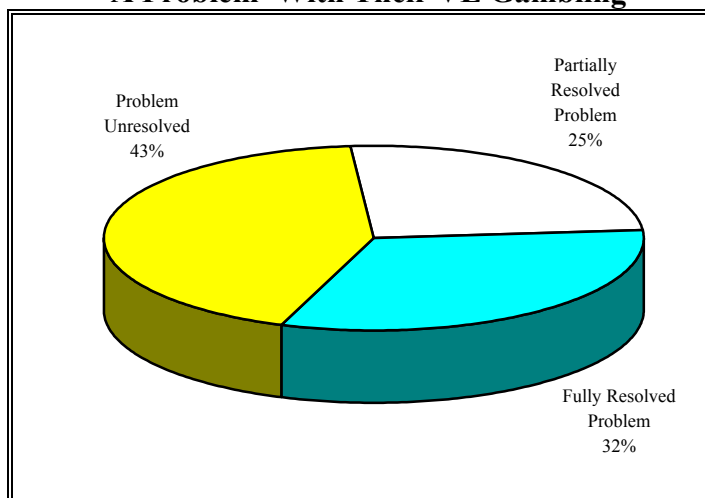
Based on player perceptions regarding their VL play, the segmentation approach used in the current study appears to be successful in grouping the Regular Player base into the two segments that exhibit few symptoms of problem VL play (the Frequent and Infrequent Players) and the one segment of those players exhibiting problems with VL play.

Figure 3.8.2
Perceptions Of VL Play Problems By Player Segment

Perception	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)
Percentage of Regular Players	100%	46%	38%	16%
Still have a problem spending too much <u>money</u> on VL play	16%	1%†	3%†	85%
Still have a problem spending too much <u>time</u> on VL play	14%	1%†	4%†	79%
Still have a problem spending too much <u>time</u> and/or <u>money</u> on VL play	17%	2%†	3%†	91%
Those who rate their problem 5+ on a 10 point problem scale	14%	2%	4%	75%
Someone else feels they have a problem	18%	5%	13%	68%

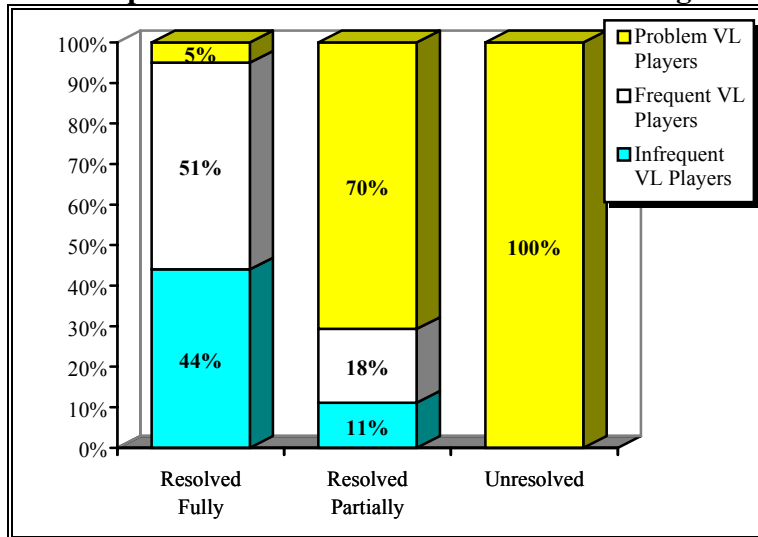
† VL Players indicating partial resolution of time and money problems were not automatically included in the Problem Players segment.

Graph 3.8.2a
Problem Resolution For All Those Regular VL Players Who Report Having A Problem With Their VL Gambling



Regardless of VL player segment, one-quarter of all current Regular VL Players in Nova Scotia directly state they have experienced time and/or money problems with their VL gambling. Only one-third (32%) of these players (8% of Regular VL Gamblers) indicate they have fully resolved their problem which means 68% of all those Regular VL Gamblers who have ever perceived themselves to have had problems with their VL gambling report they are still experiencing difficulties in this regard. This represents 16% of current VL gamblers in Nova Scotia.

Graph 3.8.2b
Composition Of Each Problem Resolution Segment



By definition, those Regular Players reporting their VL gambling is currently problematic (self-declared) were automatically included in the Problem Player segment. Therefore, Problem VL Gamblers account for 100% of those Regular Players who consider their VL gambling to still be an unresolved problem.

Not surprisingly, current Problem VL Gamblers also comprise the majority (70%) of those who have only partially resolved their problem and, conversely, only represent 5%

of those who feel their problem has been successfully resolved.

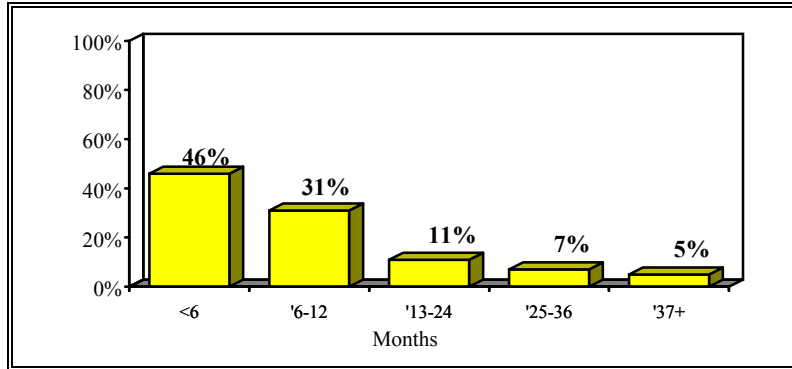
It is noteworthy that, overall, 2.6% (n=3) of those identified as Problem VL Gamblers in the current study state they have resolved their VL problem, and an additional 6.0% (n=7) feel that they have never had a problem. This may be seen to indicate a tendency for the Problem Player classification used to yield “false positives” for approximately 9% of the Problem VL Gambler segment. However, these players are categorized as Problem VL Gamblers based on their derived response to the multi-item attitude measure and the independent rating scale of their perceptions as to how serious of a problem their VL gambling is at this time (5+ on a 10-point scale).

Interestingly, the three Problem VL Gamblers who feel they have overcome their problems have only done so within the last year, with one having “solved” his/her problem in the last month and another only four months ago. Thus, the recency of their “problem” VL play is still exerting a negative influence on both their attitudes and perceptions. They are still playing on a regular basis and, consequently, may be highly vulnerable to lapsing back into problem play. However, it may also be that they are rationalizing their continued play by reporting it is now under control.

There were 6% of Problem Players who stated they have “never felt they were spending more time and money playing VLT’s than they should.” While they are not overtly acknowledging that their play is problematic, they do manifest other attitudes, beliefs and motivations consistent with problem play and rate their current VL play significantly higher than other, non-problem players, in terms of it being a serious problem for them (5 to 7 on a 10-point scale versus ≈1 to 2). Although, when confronted, they may deny that they themselves feel their VL gambling has ever been a problem, the results from the other independent measures of problem play suggest they are experiencing some difficulties and are aware that VLT’s are having a negative impact on their lives.

3.8.3 Length Of Time Since Controlling Problem VL Play

Graph 3.8.3
Number Of Months Since Frequent & Infrequent
Players Who Have Had A Problem With VL Play
Solved Their Problem



To determine how long “problem free” VL play has been sustained by those Regular Players who report they have resolved past problems with their VL gambling, the responses for both Infrequent and Frequent Players were combined. Collectively, 11% of Regular VL Players in the non-problem segments indicate, at some time in the past, they have experienced problems with the

amount of time (2%), money (4%) or both (5%) spent on VL gambling. Overall 9% report they have completely resolved their problem play and 2% note partial resolution.

It is noteworthy that only 23% of those who have managed to resolve their VL gambling problems (i.e., regain control of their play) did so more than one year ago. For those players, the danger of returning to problem play may be low, given the length of time they have sustained (what they consider to be) non-problematic VL play.

However, approximately 77% of those who have solved their VL playing problems only did so within the last year. These people are still playing on a regular basis and probably are at greater risk of lapsing back into problem play. It may be advisable to target this group of past problem players with reinforcement strategies to assist them in either stopping play altogether or maintaining their present play levels.

The majority (~63%) of Infrequent and Frequent Players who have had problems say they have tried several times to control their spending in the past. This suggests that some players may have struggled in controlling their play and their current success may be tenuous or temporary. Thus, the chances of a relapse may be high for these individuals. Conversely, as has been noted for other substance addictions (i.e., alcohol, cigarettes, drugs), the “addicted” individual frequently undertakes multiple attempts to stop using the substance before successfully quitting. There may be a similar pattern for VL gambling. This is supported by the distribution which has most of the Regular Players who are past problem players having solved their problem within the last year (77%) or last two years (88%). This suggests that these players either relapse into problem play or stop playing altogether. One plausible explanation for this distribution is, therefore, that being a Regular Player with past problems is, for most, a temporary state, not lasting for more than a year or two, with players moving in and out of problem play. However, it may also be indicative of the stage people are at in dealing with their problem VL gambling.

According to the Stages of Change model, developed by Prochaska & DiClemente (1984), which identified (what they believe to be) five basic components of human change (Prochaska & DiClemente, 1986, 1992), people typically progress through a series of changes which are

associated with distinct characteristics and ways of thinking. In particular, recycling through the stages is fairly common and, thus, relapses are seen as a normal and expected part of recovery for the addict or, in this case, Problem VL Players.

Another plausible explanation for the high proportion of Regular Players solving their problem within the past year may be that the availability of the Gambling Help Line, the intervention of counseling through Drug Dependency and other organizations, the availability of self help organizations such as Gambler's Anonymous, and the publicity that has surrounded problem VL gambling in the previous few years have all contributed to these players either quitting or addressing their problem VL play.

The methods used to control and cope with problem play will be explored in Section 3.10. This will provide insight into the role of the various agencies in helping those players control their play.

3.9 Impact Of Play

3.9.1 Impact At The Time Of Play

This section presents the impact of VL gambling on Regular VL Gamblers, and Problem VL Gamblers in particular. The VL gambling behaviours and outcomes, outlined in the previous sections, identified the potential for substantial effects on the life of the gambler, as well as their friends and relatives. The three major causes of the impact on gamblers' lives would be the nature of the activity (the play of the games); the costs associated with gambling (losses) and the time spent gambling. The model separates the causes from the impacts of these behaviours. The fact that the Regular VL Gambler loses, on average, \$244.00 a month indicates how much of their income is put toward gambling, which may or may not have a positive or negative impact on the gamblers behaviours.

Interview time constraints and the survey medium (telephone) limited the depth to which the questionnaire explored the impact of VL gambling on gamblers. In discussion with DOH officials at the survey design stage, it was decided to eliminate questions that dealt with highly sensitive topics such as suicidal ideation, marriage breakups, family abuse, bankruptcy and theft to procure funds for gambling. (See Section 3.0 Introduction To Problem Player Analysis.) However, Focal Research did create a panel of regular gamblers who could be revisited using in-depth interview techniques to measure these potential impacts.

There was still a substantial amount of information collected on the impact of VL gambling on these gamblers. The effects are broken down into two major categories: effects that occur at the time of gambling and effects that happen over time. The effects at the time of gambling are classified into behavioural (including drinking and smoking), emotional and physiological. Also included in this category is significant family or work related events missed as a result of VL gambling. The effects that occur over time include the impact on the gamblers themselves, their relationships and their incurring of debt.

These measures will provide a good picture of the overall impact of VL gambling on gamblers' lives. For example, if 38% of Problem VL Gamblers say VL gambling has put a strain on their relationships at home, then this suggests VL gambling has an impact on family relationships for a substantial portion of Problem VL Gamblers. (Of course, other family members may have differing points of view.) If the results suggest that only 7% of all Regular VL Gamblers agree to the statement, this supports the conclusion that negative effects on family relations do not result from VL gambling for most Regular VL Gamblers.

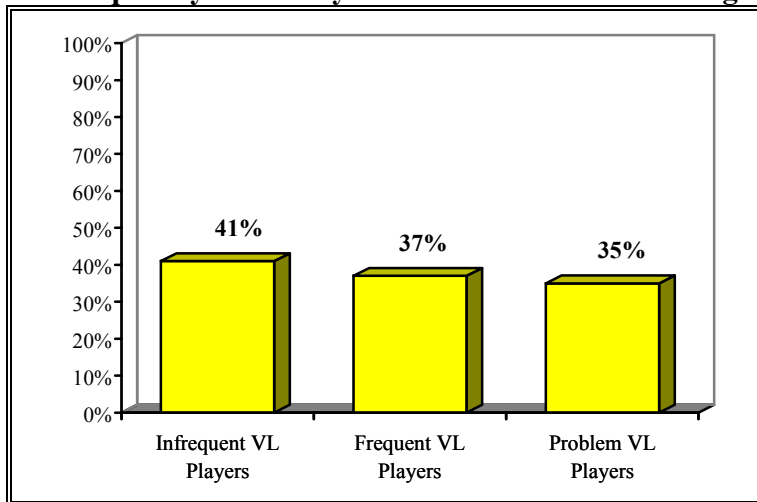
3.9.1.1 Drinking (Table 3.9.1.1 - Appendix D)

It was found in the general analysis of Regular VL Gamblers that only 39% consume alcoholic beverages frequently or always when they are playing VLT's. For half (52%) of all Regular Players, their drinking is unaffected when playing video lottery games, with 24% actually reporting they drink less. Only 4% report a tendency to consume more alcohol when involved in VL gambling and, overall, 26% report they never drink while playing the machines. In general, Regular VL Gamblers tend to drink less alcohol when they play, in order to save money for play and to maintain their ability to focus on game play.

The question then is, do Problem VL Gamblers show the same restraint, or does alcohol play a role in problem gambling, either as a cause or as a result of playing the VL games? In particular, when they are losing, do they drink more alcohol, thus, exacerbating the situation?

It was found in the analysis of location specific situations that 14% of Problem VL Gamblers say they sometimes spend too much time and/or money when they are drinking compared to 3% of Frequent Gamblers. This suggests that the combination of drinking and gambling could be a problem for some Problem VL Gamblers. However, the following analysis further explores this issue and suggests an alternative conclusion which can be drawn from these results.

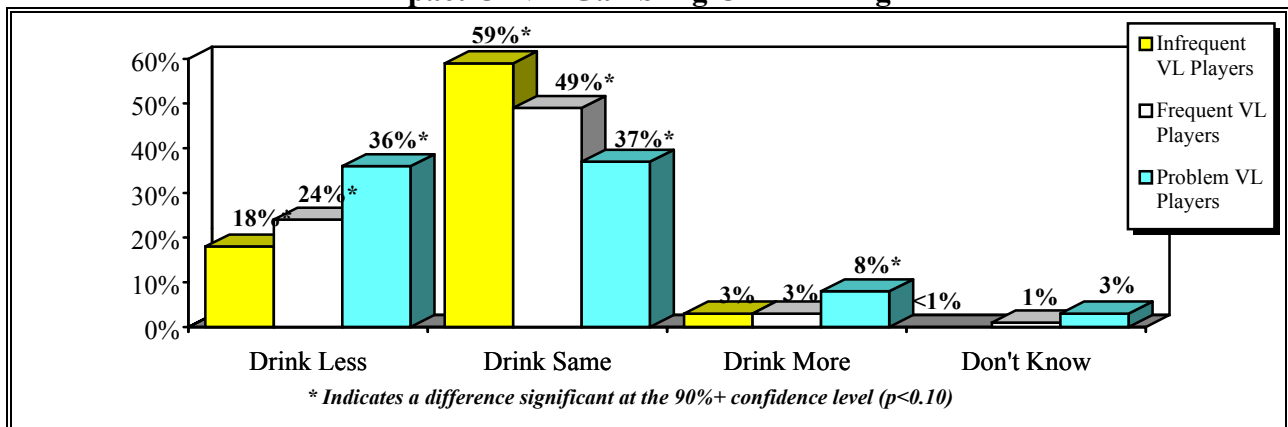
Graph 3.9.1.1a
Frequently Or Always Drink While VL Gambling



Problem VL Gamblers are no more likely to be drinking while they play than gamblers in the other segments, suggesting that alcohol consumption is neither a cause nor an effect of problem VL gambling. There were also no significant differences among the three segments in terms of reasons why they do not drink while gambling, with Problem VL Gamblers equally likely to be non-drinkers (17% versus 22% for Frequent and 18% for Infrequent Players). **This suggests that Problem VL**

Gamblers may not be more, or less, likely to have alcohol drinking problems than those in the Non-Problem VL Player segments.

Graph 3.9.1.1b
Impact Of VL Gambling On Drinking

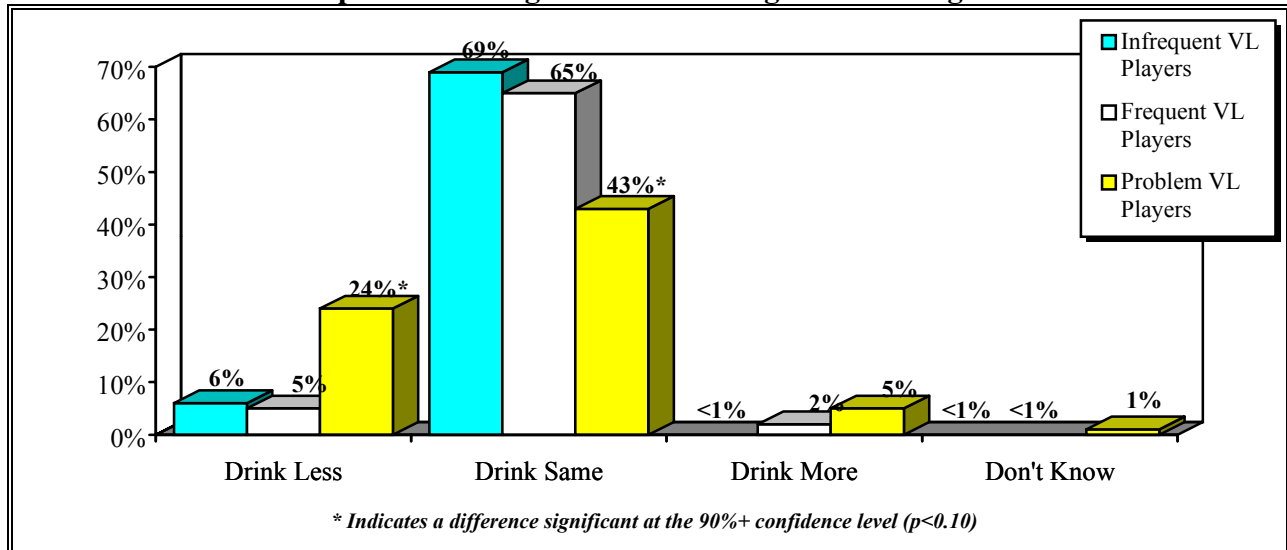


There is a significantly higher proportion of Problem VL Gamblers who report they drink less alcohol than they would if they were not gambling on VLT's (36% versus 24% for Frequent VL Gamblers and 18% for Infrequent VL Gamblers). Therefore, approximately one-third of

Problem VL Gamblers drink less alcohol when they gamble which, on the whole, could be considered a positive outcome of VL play.

Offsetting this to some extent is the 8% of Problem VL Gamblers who drink more alcohol when they play (which is significantly higher than the 3% of VL gamblers in the other segments). The potential negative impact on these Problem VL Gamblers could be an even greater cause for concern, if they drink more when they are losing.

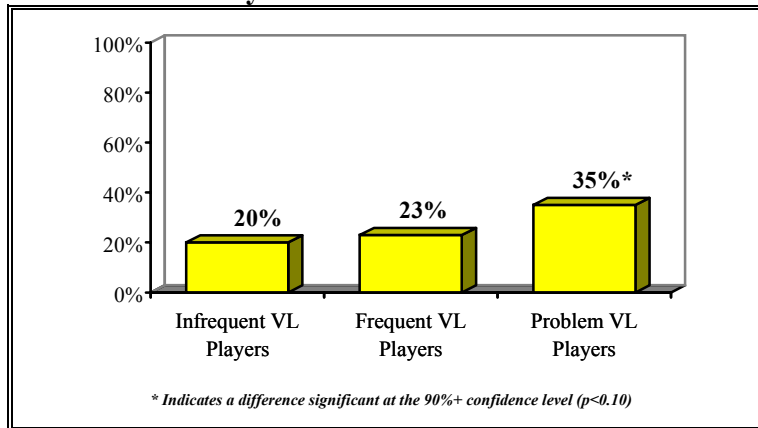
Graph 3.9.1.1c
Impact Of Losing At VL Gambling On Drinking



Generally, 26% of Regular VL Players never drink when they play VLT's which is similar within all three player segments. Thus, for approximately one-quarter (27%) of Problem VL Gamblers, drinking when winning or losing is not an issue. An additional 24% of Problem VL Gamblers claim they are even less likely to drink when they are losing (compared to 5% and 6% for the other segments). This result suggests that many of these gamblers are extremely focused on the game and that alcohol consumption is viewed as reducing their skill level when playing (e.g., being able to hit the stop button effectively), or as leading to a reduced ability to control their spending.

The conclusion, therefore, is that alcohol is not likely a cause of problem VL gambling, and that one effect of VL gambling, particularly for Problem VL Gamblers, is a reduction in alcohol consumption during play.

Graph 3.9.1.1d
Percentage Who Say They Have Played VL Machines
When They Have Had Too Much To Drink



Having concluded this, it is interesting to note that 35% of Problem VL Gamblers indicate they have gambled when they have had too much to drink (i.e., they considered themselves to be intoxicated). Frequent VL Gamblers (23%) and Infrequent VL Gamblers (20%) are much less likely to say this. **Problem VL Gamblers are much more likely to drink less when they are playing, and when they are losing. They also believe, to a greater extent than other**

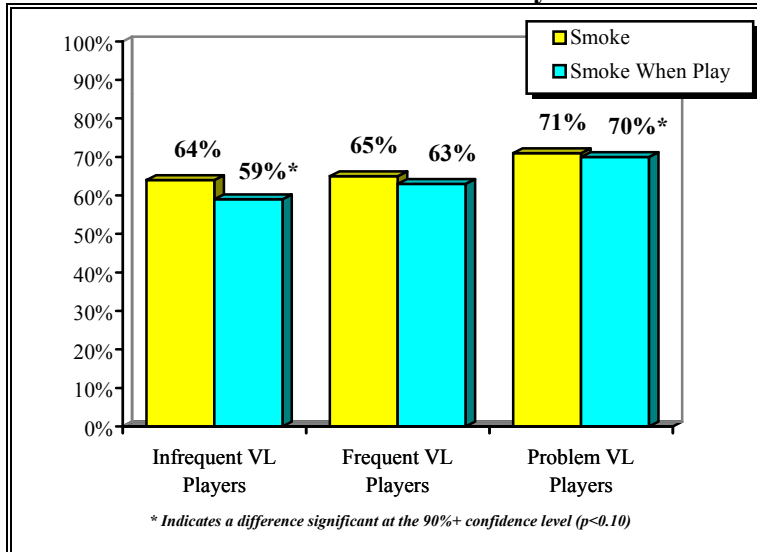
Regular VL Gamblers, that they can influence their winning by how they play. It is, therefore, likely that the 35% of Problem VL Gamblers who report having ever consumed too much alcohol when playing VLT's are expressing concerns about the effects of drinking on their gambling rather than higher consumption of alcohol during play.

While 14% of Problem VL Gamblers say that drinking is one of the situations where they spend too much on VL games, this is likely a reflection of their concern for their ability to control their play, rather than a greater impact of drinking on their play behaviour.

NOTE: While this analysis does shed light on the effects of VL gambling on drinking during the play of the games, it does not necessarily follow that reduced consumption during play leads to reduced consumption after play. Research specifically addressing the consumption of drugs and alcohol outside the gambling venue would be needed to address this issue. Furthermore, the amount of alcohol consumed was not specified. Thus, while individuals may be drinking less when they are playing, the absolute amounts of alcohol typically consumed are unknown.

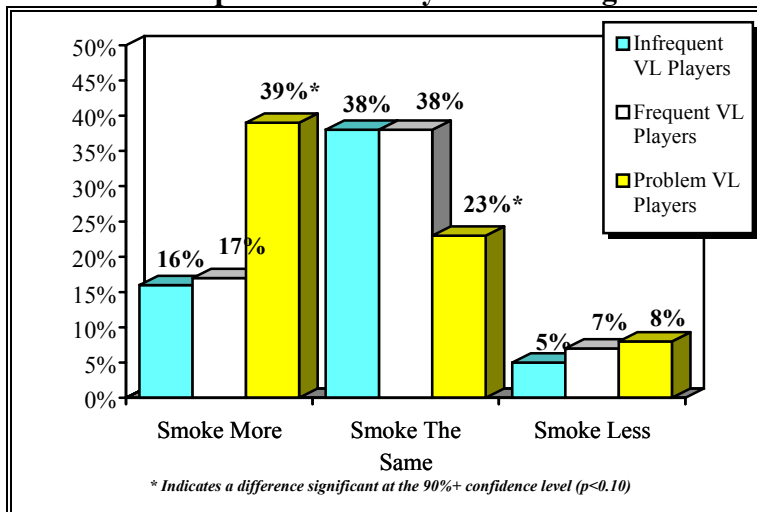
3.9.1.2 Smoking (Table 3.9.1.2 - Appendix D)

Graph 3.9.1.2a
Those Who Smoke &
Those Who Smoke When They Gamble



Problem VL Gamblers are no more likely to be smokers than those in the other segments (64% - 71%), but they are more likely (70%) than Infrequent Players (59%) to smoke while they play. This makes sense, given that Problem VL Gamblers gamble for extended periods of time compared to Infrequent Players. However, it is possible that the level of smoking exhibited by Problem VL Gamblers while they play is a result of their gambling behaviour.

Graph 3.9.1.2b
Impact Of VL Play On Smoking

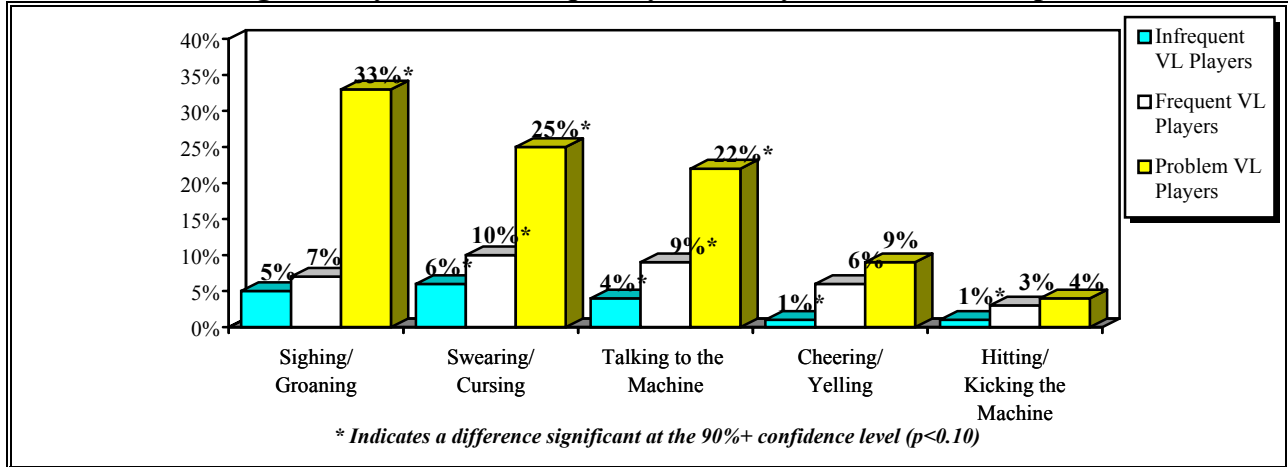


To examine this possibility, players were asked whether they smoke more, the same, or less while they are playing VL games. A much higher proportion (39%) of Problem VL Gamblers say they smoke more when they play compared to the two other segments (17% and 16%). Unlike alcohol, smoking is not likely viewed as inhibiting their ability to “play effectively,” and may actually be seen as enhancing their ability to focus on the play of the games. As well, smoking may help them pass the time

during the hours of play. For others, VL machines are located in smoking areas so they are able to smoke, whereas during the rest of the day, they are in locations where smoking is prohibited (e.g., the workplace). Whatever the reasons, a negative impact of VL play on Problem VL Gamblers is increased smoking of cigarettes.

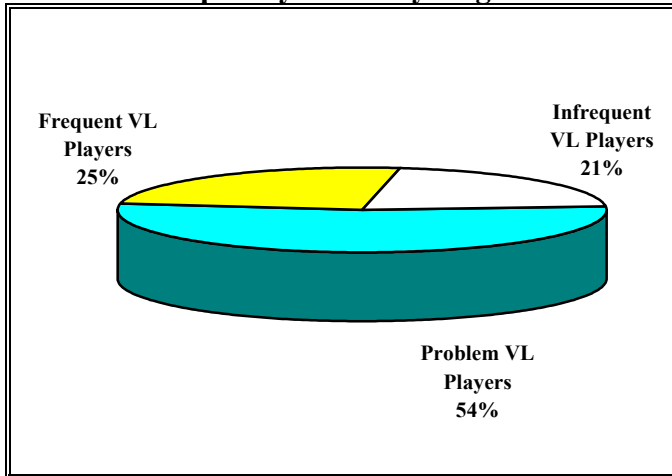
3.9.1.3 Behavioural Responses While Playing The Machines (Table 3.9.1.3 - Appendix D)

**Graph 3.9.1.3a
Behavioural Responses While Playing VL Games:
Percentage of Players Who Frequently or Always Have These Responses**

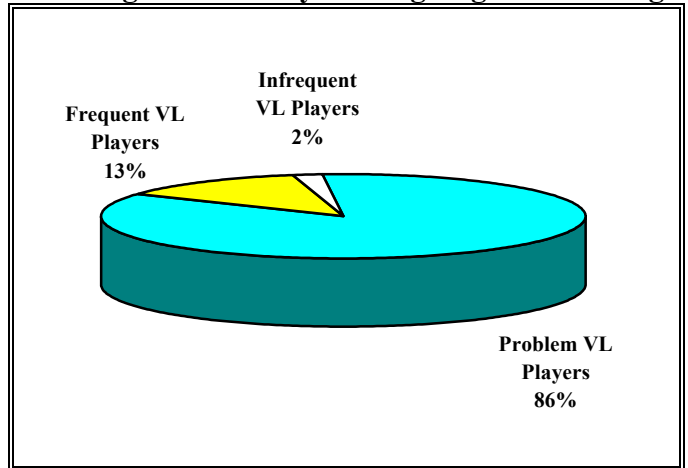


Five measures of specific behavioural responses were included in the survey. The graph above shows the percentage of each segment that frequently (>50%) or almost always (~100%) exhibits these responses. **Problem VL Gamblers are much more likely to have behavioural responses while playing the games, in particular, negative responses such as groaning or swearing, which should help others identify those gamblers who may be having problems.** For example, 33% of Problem VL Gamblers report they frequently or always sigh or groan when playing the machines; they comprise 54% of all those Regular VL Players who frequently engage in this behaviour. As they play more frequently than the Infrequent Players, and they play for much longer time periods than those in the other segments, there is a very high probability that, if a gambler is heard to be sighing and groaning, he/she is most likely a Problem VL Gambler (86% versus 13% for Frequent Players and 2% for Infrequent Players). (NOTE: This analysis assumes that the amount of “groaning and sighing” is constant over time, and that a person who plays for two hours will engage in this behaviour twice as often as a person who plays for one hour.)

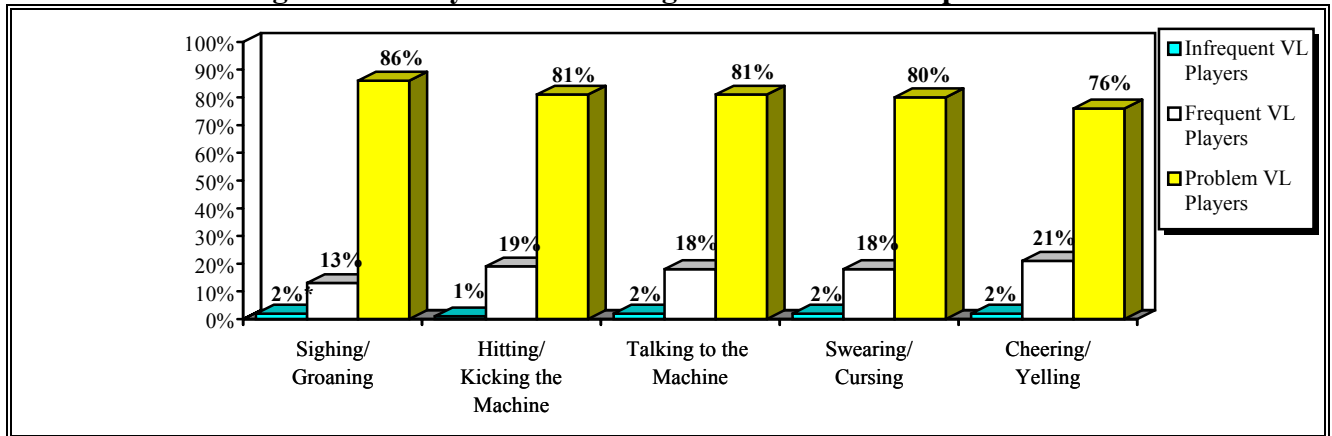
Graph 3.9.1.3b
Segment Profile of Those Regular VL Players Who Frequently or Always Sigh or Groan



Graph 3.9.1.3c
Probability A Regular VL Player Belongs To Each Segment If They Are Sighing or Groaning



Graph 3.9.1.3d
Probability of Regular Players Belonging To A Particular Segment If They Are Exhibiting A Behavioural Response

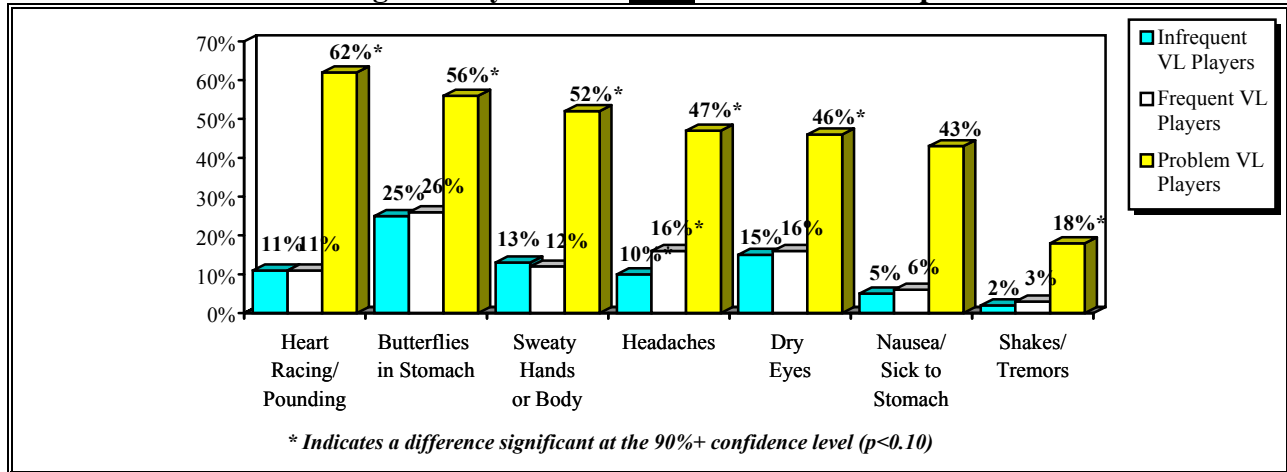


In summary, Problem VL Players are much more likely to exhibit behavioural responses associated with displeasure. These expressions are likely in response to their higher level of involvement with the game, as well as acknowledgement of the magnitude and consequences of their losses. Video lottery gamblers who are observed at any point in time exhibiting these behaviours have a 76% to 86% chance of being Problem VL Gamblers.

3.9.1.4 Physiological & Emotional Responses (Table 3.9.1.4 - Appendix D)

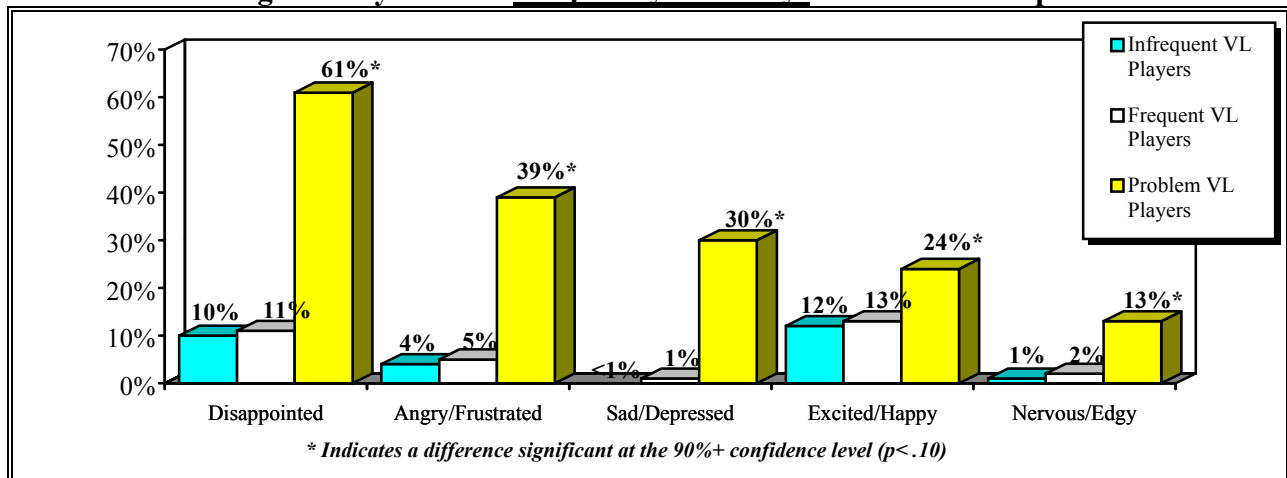
The frequency with which all regular players experience physiological reactions to VL gambling is lower than the frequency with which they exhibit behavioural responses. The graph below, therefore, presents the percentage of gamblers in each segment who have ever experienced a physiological effect when playing the games.

Graph 3.9.1.4a
Physiological Response While Playing VL Games:
Percentage of Players Who Ever Have These Responses



It is apparent that playing video lottery games has a much stronger physiological effect on Problem VL Gamblers than it does on those in the other segments. This suggests that the nature of their gambling is distinctly different from those players who do not have a problem. Their involvement with the game, their intensity of concentration and their reaction to the outcome of the game are all stronger.

Graph 3.9.1.4b
Emotional Response While Playing VL Games:
Percentage of Players Who Frequently or Always Have These Responses



Over half (61%) of the Problem VL Players feel disappointed, frequently or almost always, when they play (compared to 10% to 11% for the other segments), and many are frequently angry and frustrated (39% versus 5% to 4%), or sad and depressed (30% versus 9% to 13%) while playing VL games. Therefore, negative emotional responses when playing the games are more common for most of these players, as compared to feeling excited or happy (24% versus 12% to 13%). Frequent and Infrequent VL Players, for the most part, are less likely to indicate any emotional response at all when playing the games. Comparatively, small proportions of these two playing

segments will frequently feel either disappointment (10% to 11%) and/or excitement or happiness (12% to 13%), likely in response to the outcome of their play (i.e., leave the machine as a "winner" or "loser"). **This underscores the higher degree of involvement with VL gambling for Problem VL Players, as they are much more likely to experience a variety of emotional responses in relation to both the outcome of the game, and the act of playing (e.g., frustrated, sad/depressed or nervous/edgy while playing).**

The fact that Problem VL Players are much more likely to have negative physiological and emotional reactions to playing the games leads to the question, why do they play? We speculate that these negative responses are like the "spills and thrills" of sports like downhill skiing or the reaction to a string of bad scores or poor performance when bowling. The disappointment, frustration and butterflies that occur because of their higher involvement in the games only act to make the "victories" sweeter. The irony is, unlike with sports where the "player's" chances of winning are dependent upon their skill levels and, thus, a "poor" or less skilled player may rarely do well, these VL players will inevitably have winning days. When they win, they will feel they have used their skills to defeat the game; they are champions, and they have the money to spend as well.

These same negative physiological and emotional responses are also the factors that lead most Problem VL Gamblers to recognize they have a problem. Most of the time they play, the results are disappointing, and they often feel depressed. As players finish playing, these outcomes can be viewed as counterbalancing the positive aspects Problem VL Gamblers associate with VL play. This may be a reasonable time for intervening, as they may be more susceptible to accepting help in solving their "problem" at these times. In some cases, they may be renewing their commitment to stick to their budgets, never play again, stay away from the machines. Interventions by friends and family or bar staff extending a pamphlet or information may serve to reinforce or strengthen the players' resolve. However, many of these VL gamblers may be angry or rationalizing their experience by focusing on the "near misses" (*"I almost won"*), or other strategic mistakes they made during play. Some may even be contemplating further chasing of losses to recoup the money already "invested" in the machines (*"I've got \$200.00 in there--it's ready to go (payout)"*). Countering these arguments at the time they are being formulated and close (time-wise) to the actual play experience may interrupt the pattern (albeit possibly on only a temporary basis).

A final component identified was players' response to the single statement, "I sometimes get frustrated when people tie up the machines." A large portion (44%) of Problem VL Players feel this frustration (versus 6% and 12%) which would likely create tension at the site where they play. This would be a particular problem for those Problem VL Gamblers who frequently want to play on particular machines or in a particular area within the location.

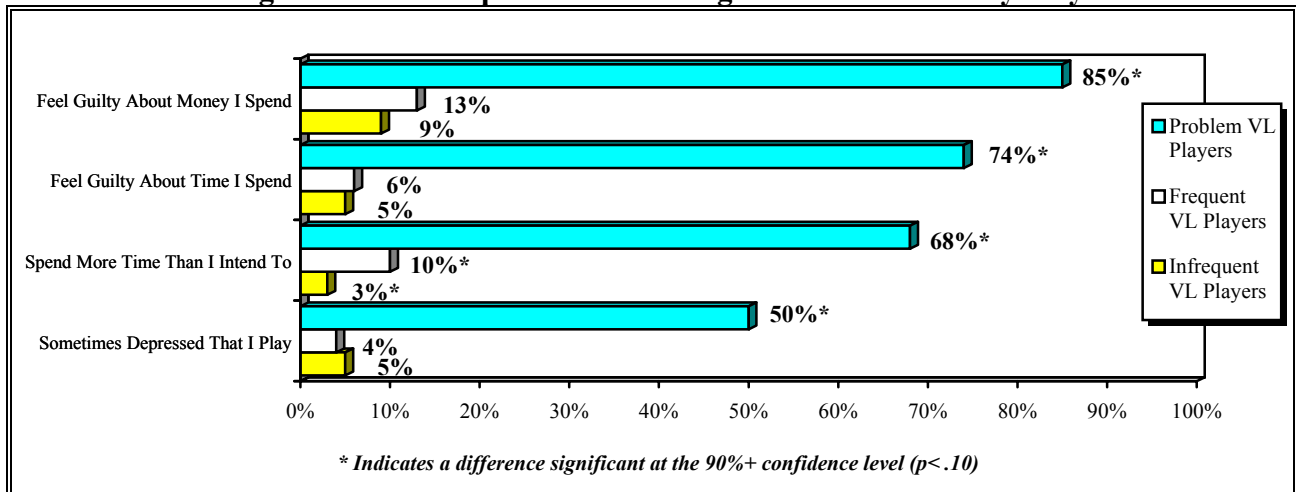
3.9.2 Impact Of Video Lottery Play Over Time (Table 3.9.2 - Appendix D)

3.9.2.1 Feelings Of Guilt & Depression

Several aspects hypothesized to be influenced by problem VL gambling were measured with eleven psychographic statements, using a five-point scale to measure disagreement or agreement with each statement. Principal Component Analysis was used to group these statements into two independent multi-item measures which help provide an understanding of the underlying structure of the effects of the VL gambling. These two dimensions are:

1. Feelings of guilt and depression resulting from VL play.
2. Impact on relationships resulting from VL gambling.

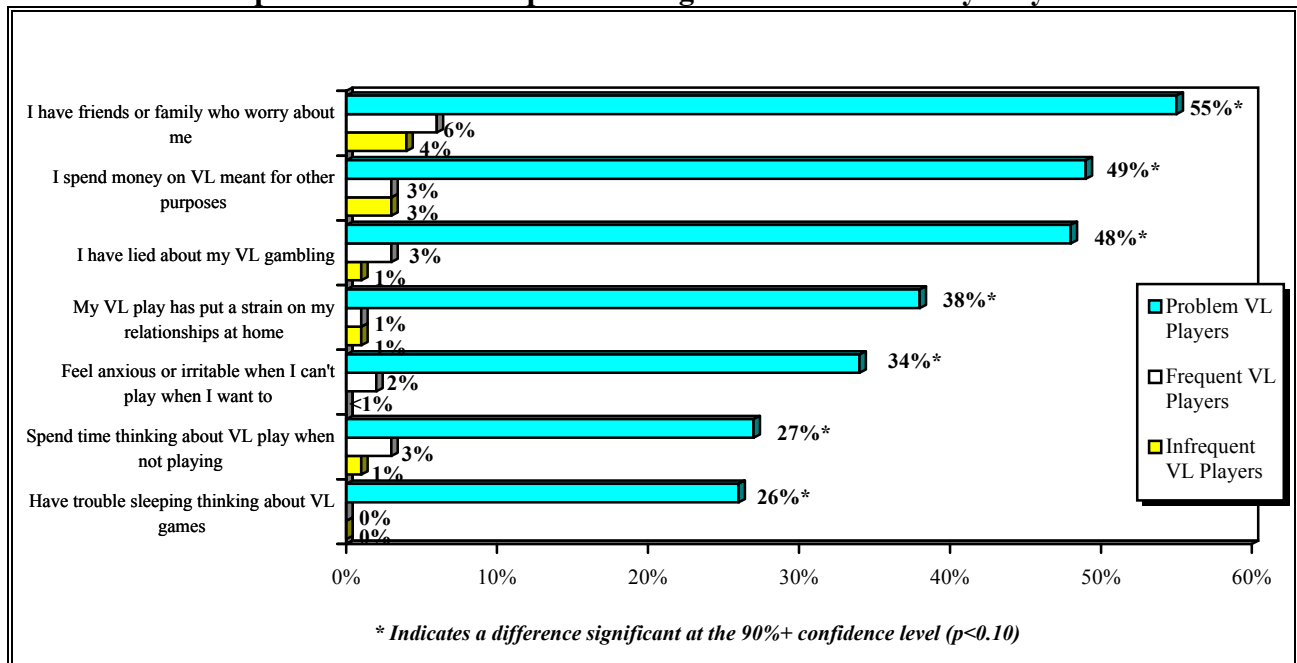
Graph 3.9.2.1
Feelings of Guilt & Depression Resulting From Video Lottery Play



It is apparent from the graph above that relatively few (3% to 13%) Frequent or Infrequent Players ever feel guilty or depressed regarding their VL gambling. However, the level of disappointment and depression Problem VL Gamblers experience carries over to their general state of mind, with many reporting they feel guilty (85%) or depressed (50%) about their play.

3.9.2.2 Impact On Relationships

Graph 3.9.2.2a
Impact On Relationships Resulting From Video Lottery Play



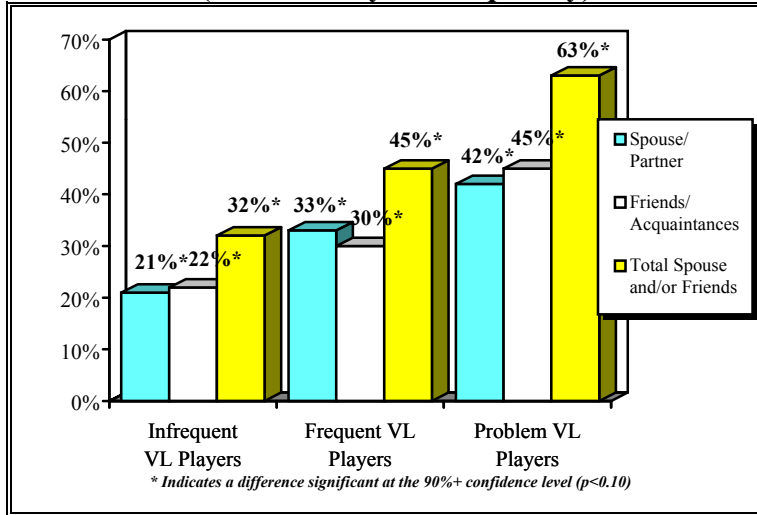
For the majority of Regular VL Players (i.e., Frequent and Infrequent Players), there is also little to no perceived impact on their relationships with family and friends due to their VL gambling (0% to 6%). **Problem VL Gamblers are much more likely (26% to 55%) to feel stresses on their relationships due to the effects of time and money spent playing VL games.**

The single most defining statement (highest component loading) is that VL play has put a strain on their relationships at home (38% versus 1%). Problem VL Gamblers are also more likely to have friends or family who worry or complain about their VL play (55% versus 4% to 6%). The presence of family strain and worry are strongly associated with reported trouble sleeping due to thinking about VL games (26% versus 0%), feeling anxious and irritable if they can't play when they want to (34% versus <1% to 2%) and spending time thinking about VL play when they are not playing (27% versus 1% to 3%).

Presumably, other significant people in the Problem VL Gambler's life react to the effects of VL gambling which puts the strain on the relationship. **The VL gambling also leads Problem VL Gamblers to spend money on VL that was meant for other purposes (49% versus 3%) and to lie about their VL play (48% versus 1% to 3%).** It is likely that, in most cases, these behaviours resulting from VL play will be discovered by the others which then leads to stresses on the relationships.

The fact that half of Problem VL Gamblers admit to spending money on VL play that was intended for other purposes (49%) and lying because of VL gambling (48%) obviously does not contribute favourably to their self esteem or their relationships. This is particularly important since it may be those people with whom they have the closest relationships who can best help them overcome their problem gambling.

Graph 3.9.2.2b
Percentage Of Players Who Talk To Spouse/Partner
And/Or Friends/Acquaintances Concerning VL Play
(Occasionally or Frequently)



VL players in each segment are equally likely to have a spouse or partner (68% to 72%). However, it is noteworthy that Problem VL Gamblers are significantly more likely than other Regular Players to be talking to their spouse or partner about their video lottery gambling.

In total, 42% of Problem VL Gamblers talk to their spouse on at least on an occasional basis regarding their play of VL games, as compared to one-third or less of the other Regular Player segments. Not surprisingly, those Regular VL Gamblers with the

lowest play levels (Infrequent Players) are least likely to discuss their VL gambling with a spouse or partner which reflects their lower involvement levels with the activity. Conversely, almost two-thirds (62%) of Problem VL Gamblers who have a spouse/partner report discussing their VL play with their partner.

Problem VL Gamblers are also more likely to be talking to friends and acquaintances about their VL gambling (45% versus 22% - 30%).

Given the time and resources Problem Players devote to VL gambling, it is not surprising that 63% indicate their VL gambling is at least an occasional topic of discussion with friends and/or family, with half of these same adults (30% of Problem VL Gamblers) reporting they frequently discuss their VL play with others.

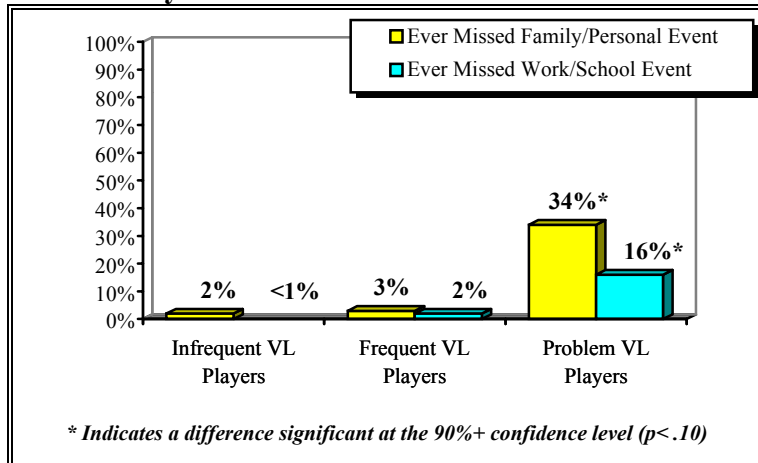
The nature of the discussions were not explored in the current study. However, the results suggest that, for the majority of Problem Gamblers, there is an on-going dialogue about their play that provides an opportunity for friends and family to intervene. Identifying and communicating those interventions which are most effective may be extremely valuable in supporting the efforts of friends and family members in addressing the problem VL gambling of someone about whom they care.

3.9.2.3 Missing Significant Events

It was hypothesized that the Problem VL Gamblers' inability to stop playing when they know they should, and their greater likelihood of playing during normal work hours, would lead them

to miss significant family, personal or work and school related activities. This, in turn, could lead to negative effects on relationships and/or employment.

Graph 3.9.2.3
Percentage of Players Who Ever Miss or Are Late For A Family/Personal Event or A Work/School Event



One-third of Problem VL Gamblers(34% versus 2% - 3%) have missed a significant family or personal event at some time in the past due to VL play. However, only 13% indicate that it happened at least occasionally in the last year. This effect could have an impact on a significant portion of Problem VL Gamblers, but it does not appear to be a consequence for the majority. It will be recalled (Section 3.2) that Problem VL Gamblers are involved in family functions less

often and, typically, devote less time to these activities than other Regular VL Players. It may be that, while they do not actually “miss” the events, they will have lower involvement levels and “cut short” their participation. As this behaviour progresses, it may be very noticeable (and problematic) to friends and family members, however, the Problem VL Gamblers may still perceive themselves as fulfilling their family obligations.

To a lesser extent, Problem VL Gamblers are also more likely to have ever missed significant work/school events (16% versus 1% - 2%), but only 4% say that this happened at least occasionally in the last year. Given the relatively high percentage of Problem VL Gamblers who are employed full-time, it might be expected that VL gambling would have a greater impact on work. From the players’ perspective, it seems that, for all but a small percentage, VL play does not affect their ability to work. However, the impact of VL gambling on work *performance* is unclear.

3.9.2.4 Impact On Debt

There are essentially two primary difficulties in estimating the debt incurred by VL gambling (and, most likely, gambling in general).

1. Quite often the gambler either consciously or unconsciously separates the activity from the debt they are carrying and/or developing.
2. It is unclear if Problem VL Gamblers may have pre-existing financial problems or constraints which obviously will be exacerbated by subsequent gambling behaviour.

For example, during the past seven years of undertaking research related to VL gambling and, in particular, during the pilot testing phase of the study, the authors of this report have often heard players who are experiencing difficulties state, *“I owe so much money, I might as well put (another) \$20.00 in the machine because maybe I’ll win big and pay off some of those bills.”* In some cases, the players may not recognize (or admit) the role of their VL gambling in their

current debt situation. In other instances, players already have financial constraints unrelated to VLT's, but can justify (or may be attracted to) play because "\$20.00" makes little to no difference in diminishing their debt load, but perhaps can be parlayed into a more substantial sum. (This may also explain why some Problem Players have higher cash-out levels and continue to spend beyond their budget, chasing the elusive "big win.") Given the play habits of Problem Players, the activity then becomes a vicious circle.

In the current study, due to constraints on the amount of information that could reasonably be gathered in the survey, all Regular Players were first asked if, "*(they) have ever increased (their) debt by borrowing money, using credit, postponing or not paying bills or selling personal belongings in order to pay for (their) play of video lottery games.*" If they recognized and admitted this was the case, they were further questioned as to their specific use of various sources of funding, both at any time in the past and during the last year. (See Appendix B - Players' Survey, page 18)

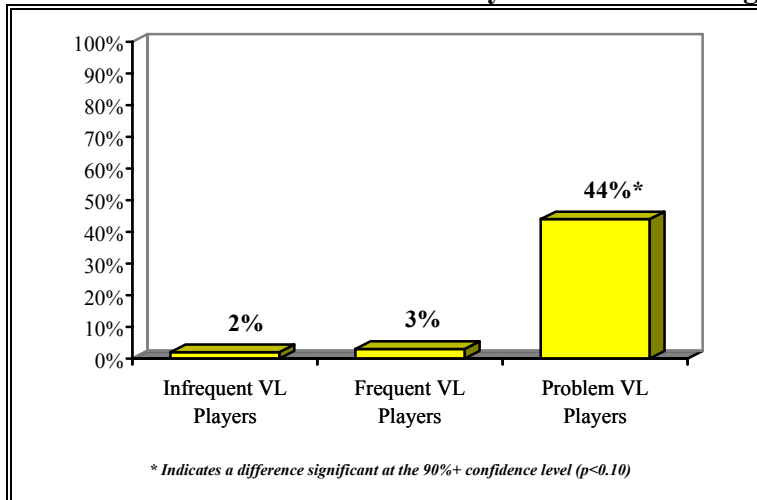
It may not be as socially acceptable to borrow money to subsidize VL gambling as it is to borrow funds to cover more legitimate expenses such as shortfalls in bills or other household expenses that, in many cases, the gambler may not be specifically associating with their gambling behaviour. Quite often the money to which a Problem VL Gambler has personal access will be spent first on VLT's and then the lack of funds to pay other expenses is rationalized and borrowed from other sources (e.g., "*the car broke down (again) and I've got to get it fixed. I just don't have the extra money right now so can I borrow some money until payday?*")

Unlike many other living and entertainment expenses, VL gambling requires an immediate cash investment in order to play; other expenses can often be put off, postponed, delayed or credit extended. Thus, gamblers do not borrow/incur debt "in order to pay for their play of VLT's," they do so to cover other more legitimate expenses for which the shortfall can often be rationalized or explained (unforeseen expenses, poor budgeting, under paid, bad luck).

Given this possibility, the actual level of debt incurred by VL gamblers may be much higher than the estimates obtained in this study, particularly if players are not attributing or relating some of their borrowing behaviour and debt load specifically to their VL gambling.

To adequately address this issue, it may be possible in future studies to establish estimates of access to various funding/sources and the debt activity and borrowing behaviour, in general, for all adults and VL gamblers. This will establish baseline measures for comparative analysis among the VL Player and Non-Player segments in the population. It will also identify what constitutes typical and atypical response in this regard. Any bias introduced by tying the debt specifically to VL gambling will be eliminated (or at least reduced) and results specifically for VL debts can be analyzed within this context.

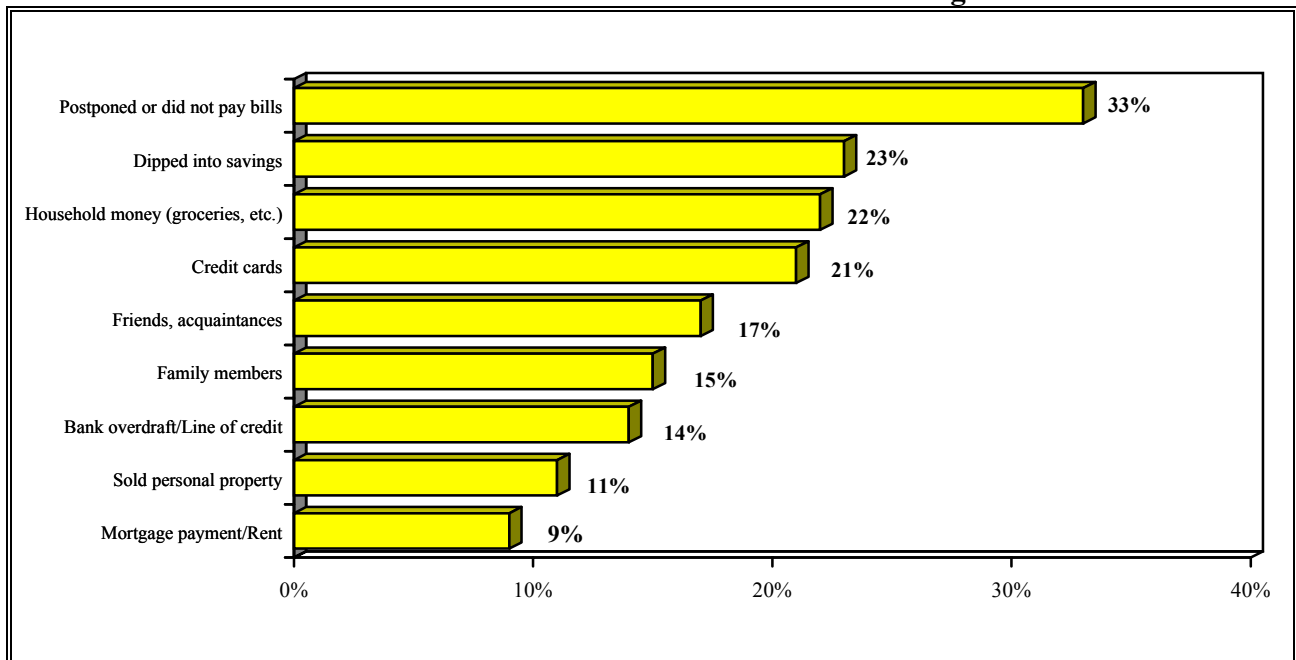
Graph 3.9.2.4a
Have Ever Gone Into Debt To Pay For VL Gambling



In the current study, Problem VL Gamblers spend, on average, a substantial amount of money on the machines. While they obviously have the option to stop play when they run out of funds, Problem VL Gamblers may be unable to stop and, therefore, are incurring debt. This appears to be the case for a large percentage (44%) of Problem VL Gamblers, while relatively few of the Frequent VL Players (3%) and Infrequent VL Players (2%) have ever gone into debt to finance their play.

The graph below lists the sources of money used in the last year to finance VL gambling by Problem VL Gamblers only.

Graph 3.9.2.4.b
Sources Of Money In The Last Year Used By Problem VL Gamblers To Finance VL Gambling



It appears that a large percentage of the Problem VL Gamblers are borrowing money to finance their continued play of VL games, with 43% borrowing from at least one source during the past year. Each of the nine sources listed are used by a significant portion of Problem VL Gamblers. There is also a fair amount of overlap among these sources, with each Problem VL Player who has borrowed VL money in the last year accessing four different sources, on average.

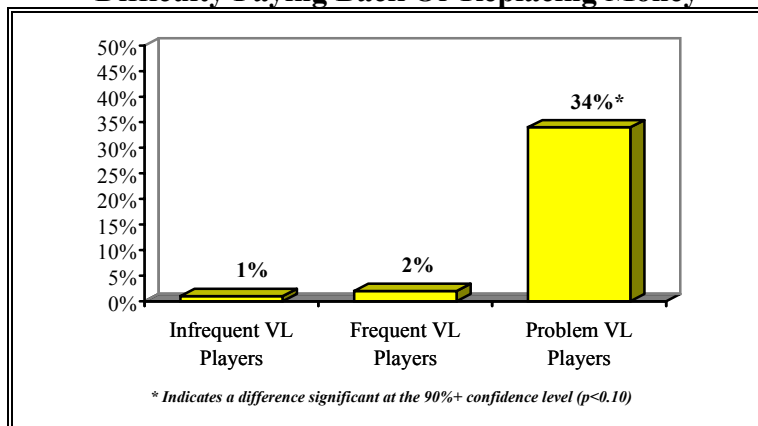
Postponing bill payments (33%) is the easiest thing to do, as it simply means diverting money that is available, but meant for other purposes. Using money meant for household purposes (22%) falls into the same category.

Almost one quarter (23%) are dipping into available cash in the form of savings. Again, this does not require obtaining credit from someone and may be viewed as a diversion of cash. The next most commonly used source of debt is credit cards (21%). These could be used on or near the site where VL games are being played.

Borrowing from friends (17%) and family members (15%) are the next most common sources of funding.

Relatively few Problem VL Gamblers use a bank overdraft/line of credit (14%), although this may be due to fewer Problem VL Gamblers having access to these types of additional funding/credit options. Approximately 11% of Problem VL Players have sold personal property during the last year, and 9% used mortgage payments or rent as sources of funds. The consequences of obtaining VL money in these manners could be substantial, for both themselves and their families, if this practice is repeated.

Graph 3.9.2.4c
Percentage Of Players Who Have Sometimes Had Difficulty Paying Back Or Replacing Money



Respondents were then asked if they sometimes had a problem paying back or replacing the money. **Few of the Infrequent (1%) and Frequent (2%) Players said yes, while a third (34%) of Problem VL Gamblers said they have experienced such problems. This suggests that the majority (79%) of all those Problem VL Gamblers who have incurred debt as a result of playing VLT's experience some difficulties in replacing the borrowed funds.**

The current results are compelling and indicate that Problem VL Players are distinguished by being significantly more likely to recognize and report that they have incurred debts as a result of their gambling. However, while incurring debt is associated with problem VL gambling, just over half (56%) of Nova Scotians characterized as having problems with their VL play report they have not (as yet) resorted to using other sources to fund their play. When all Problem VL Gamblers are considered, this suggests approximately two-thirds are not reporting any difficulties in off-setting any debts associated with their VL gambling.

This tendency (among others) may distinguish Problem VL Gamblers in the general population from those Problem VL Gamblers in treatment. It may be that the problem, in terms of the impact of VL gambling debts, is progressive for the Problem VL Gambler. Thus, examining problem play within the general population, rather than within the more narrow and extreme

behaviours and consequences for clinical and/or treatment populations, identifies opportunities for intervention and harm minimization/reduction (i.e., intervening/instituting controls before unmanageable debt loads have occurred). In many cases, this is consistent with the actual efforts undertaken by the players themselves who, in the absence of any information, help and/or assistance, use various coping strategies attempting to limit borrowing and spending on their own, with varying levels of success.

3.10 Coping Mechanisms

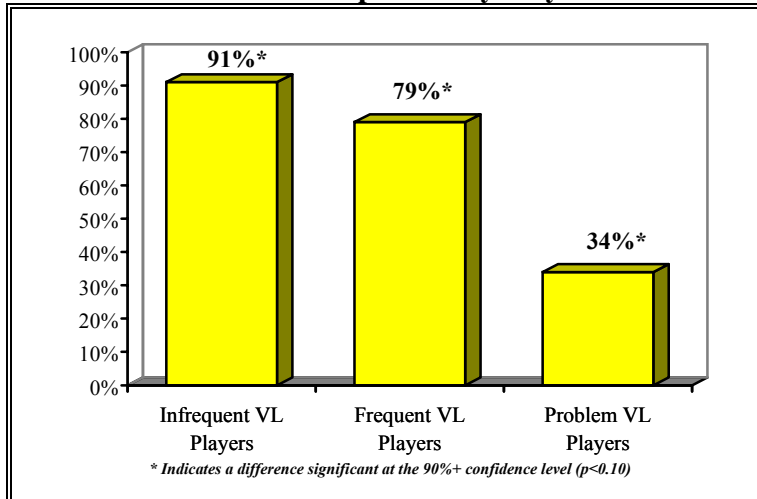
Prior to conducting the pilot study for this project, an inherent assumption in the RFP had been that players would realize they had a problem and attempt to overcome the problem using coping mechanisms (both personal and through the assistance of others) that would either prove successful or unsuccessful. The goal of the survey would, therefore, be to identify successful and unsuccessful strategies for reducing problem play. The pilot study showed this assumption to be problematic on two counts. First, most players develop mechanisms early in their playing careers in order to control for problem play, as many feel at risk and take measures to guard against spending more than their limits. Second, many players who have recognized they are experiencing problems, have tried repeatedly to stop or control their play with varying degrees of success. The result is that there is no clearly defined group of people who can be characterized as having finally overcome their problems.

These findings led to the inclusion of several questions in the survey dealing specifically with coping mechanisms. All Regular VL Players were questioned as to whether or not they had attempted to stop or reduce play in the past, how often these attempts are/were undertaken, when they had last attempted to stop or reduce play, the strategies used to control and/or stop play and the relative success of these strategies. Furthermore, respondents were questioned as to which techniques or strategies had been successful and which had not. All respondents were also asked about budgeting in terms of both time and expenditure limits, how often they exceed their budget, and the success of strategies used (usually successful, sometimes successful or usually not successful).

Later in the survey, respondents who claimed to have had a problem at some time in the past were identified. These "self declared" Problem VL Gamblers indicated their success in dealing with problem play and listed successful and unsuccessful coping mechanisms. Whether those who had a problem had sought, or received, help from others was also examined and the relative usefulness of these sources of help (i.e., people and/or agencies) were rated. Finally, they were asked to indicate what type of assistance from others was successful or unsuccessful in helping them resolve their problems in the long run.

3.10.1 Attempts To Stop Or Reduce Play (Table 3.10.1 - Appendix D)

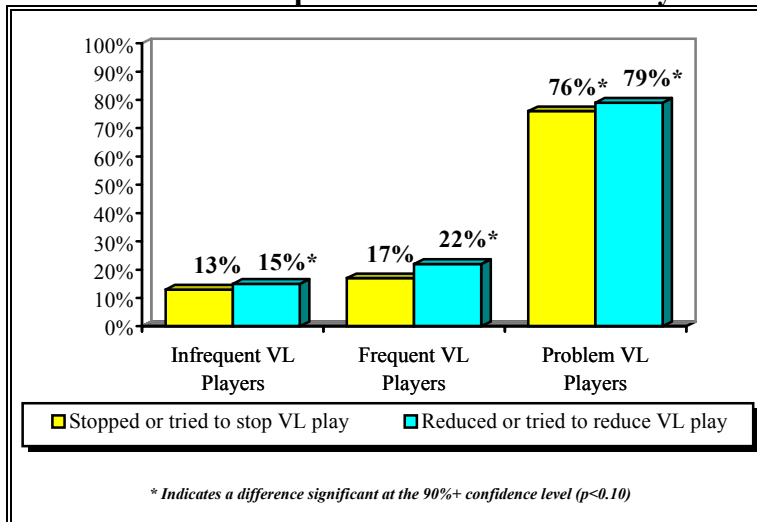
Graph 3.10.1a
Could Give Up VL Play Anytime



The experience of repeated failed attempts to stop and/or reduce their VL play have led half of the Problem Players (50% compared with 10% - 12% of the other segments) to say they **cannot** give up playing VL games anytime they want. Only 34% of Problem Players feel they can give up VL play anytime they wanted (compared with 91% of Infrequent Players and 77% of Frequent Players). Problem Players feel a lack of control over their VL gambling. **This is reinforced by the fact that,**

when in a location which has VLT machines, 65% of Problem Players report they will want to play and, three-quarters report, they sometimes find it hard to stop playing when they know they should.

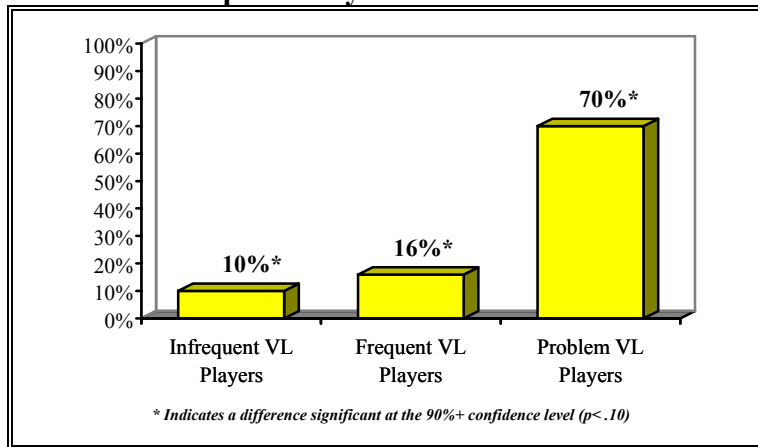
Graph 3.10.1b
Percentage Of Regular VL Players Who Have Tried To Stop Or Reduce Their VL Play



As a result, 76% of Problem Players have, at some time, either stopped, or tried to stop playing completely and 79% have attempted to reduce their VL play. The large majority of those in the other segments have not felt the need to stop or attempt to stop VL play, with only 13% of Infrequent and 17% of Frequent Players having attempted to give up VL play completely in the past. The percentage of non-problem VL gamblers who have reduced, or attempted to reduce, the amount of time and/or money spent, is not much higher, with 15% of Infrequent Players and

22% of Frequent Players attempting to reduce their play in the past. This suggests that most players have either already imposed what they consider to be effective control mechanisms on their VL gambling, or they have not spent/do not spend enough time or money on VL (as yet) to motivate them to undertake measures for controlling or managing their play.

Graph 3.10.1c
Percentage Of Players Who Have Attempted To Stop VL Play Within The Last Year



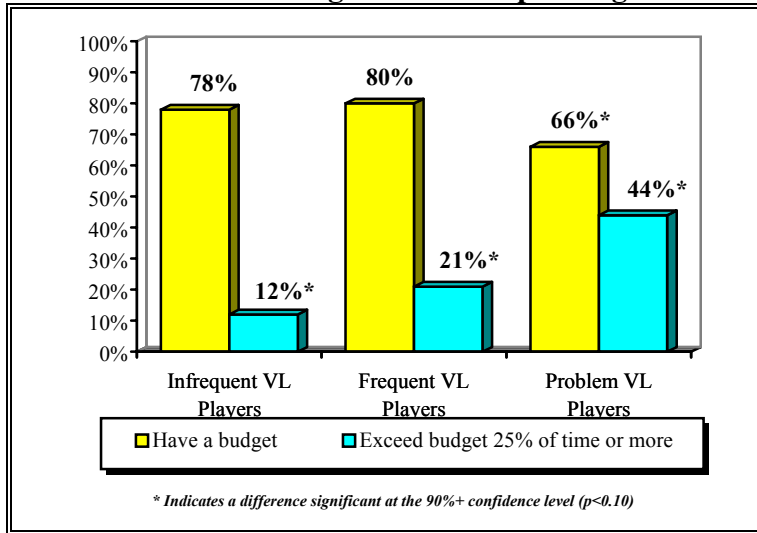
It was noted in Section 3.6 of this report (Video Lottery Play Behaviour) that many Problem Players have been playing for over four years (57%). **However, 70% of Problem VL Players have tried to stop playing within the last year, and for more than one-quarter (26%), the attempts are on-going.** This compares with 10% of Infrequent Players and 16% of Frequent Players who have attempted to give up VL gambling within the last year.

The fact that 70% of Problem VL Players have attempted to stop within the last year suggests that most *want* to stop (or reduce play), and that they may be open to assistance from others at any time. This is supported by the fact that **47% of Problem Players say they continually try to stop gambling on VLT's at least once every few months, and 58% attempt to reduce the amount of time and/or money they're spending on VLT's every few months or more often.** A strategy of identifying and approaching these players with an offer of assistance may be effective. However, considering the placement of stickers with the 1-800 Help Line number on the machines, this begs the question, how many of those hoping to stop have used this opportunity to get assistance, and if they have not done so, what are the barriers to accessing this service?

3.10.2 Budgeting (Table 3.10.2 - Appendix D)

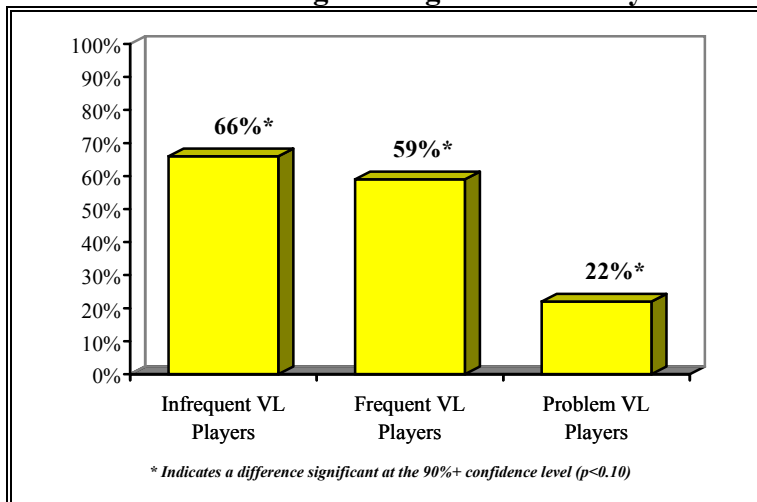
As noted in the preceding section, relatively few of the Infrequent and Frequent Players have ever attempted to stop or reduce their play of VL games. It was suggested that they have not done so because they do not see themselves as having a need for control, or that their existing control measures are working. It appears the latter may be the case for most players in these segments, but is not the case for Problem Players.

Graph 3.10.2a
Percentage Of Players Who Set & Exceed Budgets For VL Spending



limit on at least an occasional basis. It is even more compelling to observe that approximately one-third (35%) of those who set a limit are spending beyond their budget 50% or more of the time they play. Overall, 44% of Problem VL Players both set and exceed a monetary budget for VL play, as compared to 12% of Infrequent Players and 21% of Frequent Players.

Graph 3.10.2b
Percentage Of Players Who Benefit Regularly From Setting A Budget For VL Play



outside the home. Problem Players who set a per time spending limit are willing to spend considerably more (\$49.90 per time, on average). A similar differential is found for weekly and monthly budgets which average \$92.57 per month for other Regular Players and \$255.71 per month for the Problem Players. This suggests two things: first, Problem Players may be setting unrealistically high budgets, and second, the consequences of exceeding the budgets are considerably greater for these players. In combination with the fact that 66% of Problem Players do set a budget, and 44% at least occasionally exceed their limits, **this leaves only 22% of**

Infrequent (78%) and Frequent (80%) VL Players are more likely to have pre-set budgets for VL play, and are much less inclined to exceed their self-imposed limit, as compared to Problem VL Players.

Of those who have set a budget, 85% of Infrequent Players and 74% of Frequent Players *never* or *rarely* spend beyond their pre-set limit.

In contrast, **Problem VL Players are less likely to set a budget and when they do so, two-thirds (67%) end up exceeding their**

The discrepancy is even more dramatic when it is noted that budgets set by Problem Players are substantially higher than the budgets of the other segments.

Most players set a spending limit each time they play, although Problem Players do this less often (54%) than those in the other segments (67% - 68%). **The average per time budget for the Frequent and Infrequent Players is \$16.90 to \$17.79, probably the same or less than most people would budget for an evening's entertainment**

Problem Players who likely benefit regularly from budgeting compared to 66% of Infrequent Players and 59% of Frequent Players. Thus, assistance in setting and adhering to reasonable/ realistic budgets may be an important component for harm minimization efforts.

3.10.3 Other Strategies Used For Control of Spending

Problem Players are much more likely (54% compared with 18% and 25% of Infrequent and Frequent Players) to have an alternative strategy to budgeting, in order to control spending. Primarily, these other strategies work on the theory of denying themselves access to extra cash or the opportunity to play, as they feel they do not have the necessary willpower to resist play if they have the means to do so. The primary method used (29% of Problem Players) is to only bring the amount of money they have budgeted for VL play to the location. This is a more feasible strategy for Problem Players because more often their primary purpose for going to an establishment is to play VL games. In contrast, players in the other two segments are less inclined to use this strategy (8% - 13% do not bring extra cash). These players are more likely to want to have extra cash available, as they more often go to the location to socialize and engage in activities aside from VL gambling and, therefore, will apportion their money accordingly among the various options.

However, in today's age of debit (bank) and credit cards, leaving cash at home is not a major impediment to getting more cash if it is needed. In response, many Problem Players (12% compared with 1% - 3%) also use the strategy of leaving behind these cards.

A third way that Problem Players try to control their spending is to stay away from the places that have VL machines (7% compared with \approx 1%). By necessity, this would eliminate almost all licensed establishments in Nova Scotia and a variety of other non-VLT locations which are situated close to VL locations. Given the accessibility of VLT's, this is often difficult for the Problem Gamblers to enforce, unless they avoid commercial locations.

Few players in the non-problem segments report having any other strategies to control VL spending, presumably due to a lack of necessity. Problem Players, however, note using several additional strategies. Other approaches used by Problem VL Gamblers include other ways of restricting their access to cash such as never borrowing money (3%), paying bills first (3%), having their spouse or partner control all their money (2%), and having others hold on to their bank cards (2%).

Others rely on internal controls such as willpower (5%), thinking about their family and bills they must pay (3%) and setting (and adhering to) a time limit (2%).

Relatively few mentioned strategies specifically based on their play of the game (other than leaving once they have spent their budgeted amount). Strategies mentioned include playing at specific low credit levels (2%) and cash out strategies such as cashing out as soon as they are ahead (3%).

All Regular VL Players were specifically asked, aside from budgeting and play-specific control strategies, if there were any other strategies or actions they used to keep their spending under

control. These actions were further categorized by respondents into “usually, sometimes and not usually” successful strategies. The following table presents the results of this analysis. Figures represent the percentage of players in each segment who try/use the particular strategy and “usually,” “sometimes,” or “not usually” find the strategy is successful in helping them control their play.

Figure 3.10.3
Percentage Of Players In Each Segment Who Find Each Control Strategy To Be Usually, Sometimes Or Not Usually Successful

	Infrequent Players			Frequent Players			Problem Players		
	1†	2†	3†	1†	2†	3†	1†	2†	3†
Have Other Control Strategies (Besides Pre-Set Budget)	15%	3%	1%	14%	10%	1%	14%	26%	16%
Only Bring Budgeted Amount	7%	1%	<1%	7%	6%	<1%	7%	16%	6%
Leave Bank Cards At Home	1%	<1%	***	2%	1%	***	3%	7%	2%
Stay Away From Places With Machines	<1%	***	***	***	***	***	2%	3%	3%
Willpower	2%	1%	***	2%	2%	***	2%	1%	3%
Pay Bills First	***	***	***	<1%	***	***	1%	3%	***

NOTE: Other strategies mentioned by 1% or less of players are not included in the table.

†1 = Usually Successful

†2 = Sometimes Successful

†3 = Not Usually Successful

Not surprisingly, this analysis demonstrates that non-budget control strategies used by Infrequent Players tend to be successful (15% usually, 3% sometimes and 1% not usually), as is the case with Frequent Players (14% - 10% - 1%). The strategies used by Problem Players are more evenly split between successful and unsuccessful, with 14% usually successful, 26% sometimes successful, and 16% not usually successful. **The two control strategies that are most often successful for Problem Players are to bring only the budgeted amount to the location (23% usually or sometimes successful) and to leave bank cards at home (10% usually or sometimes successful).** However, as was noted earlier, Problem Players frequently borrow cash to continue play. This presumably is because they frequently use a strategy of leaving cash and cards at home and are, therefore, forced to borrow in order to continue to play. Encouraging them to continue leaving cash and cards at home and then inhibiting their access to cash on-site by discouraging borrowing and lending may an effective way to help these Problem VL Players help themselves to control overspending. Enlisting the cooperation of others in restricting borrowing behaviour on-site for on-going VL gambling may also be possible, particularly in terms of public education or communication strategies. It may also be reasonable in terms of harm minimization to make family/friends aware of efforts by players to control their VL gambling so that they can be supportive of decisions made prior to arrival at the VL location.

3.10.4 Successful Spending Control Strategies (Table 3.10.4 - Appendix D)

Those Regular VL Players who had completely, or partially, solved their problem with VL play were asked, in an open-ended question, to indicate how they got their VL spending/play under

control. Problem VL Players who had attempted to control their spending in the past were also asked to indicate what efforts or strategies were relatively successful in the long run. The distribution of the responses by these two groups are presented and compared in the following table.

Figure 3.10.4
Methods Used By Regular VL Players To Successfully Control VL Spending

	Those Who Were At Least Partially Successful (n=101)	Those Who Were <u>Not</u> Successful (n=63)
Budgeted money/Only brought budgeted amount/ small amount of money	26%	22%
Reduced frequency of play (i.e., twice per week instead of 10 times, only on weekends)	23%	3%
Willpower (i.e., just get up and leave, stopped using bank card, still go to bars but do not play machines)	22%	3%
Quit playing altogether	19%	3%
Staying away from places with machines/Avoiding machines/Stay home	10%	21%
Budgeted time/Reduced time spent playing/Cut back number of hours spent playing	7%	5%
Stopped borrowing money/Pay bills first	7%	5%
Participating in other activities (e.g., visit friends, work overtime, go to movies)	5%	8%
Left when budgeted money done/Stopped exceeding my budget	4%	2%
Left bank cards/credit cards at home/Cut up bank card	3%	8%
Thinking about/seeing problems caused by VL play (self and others)	2%	****
Eat or drink more/Spent more money on beer/food instead	1%	****
Help/Support from others - to tell me when to stop, hold VL money/bank card	1%	2%
Spouse/partner controls all our money (i.e., pay cheque goes into wife's bank account)	1%	2%
Discussions/talk with spouse/partner	1%	5%
Prayer/Religion	1%	2%
Kept VL money separate/in a separate pocket	****	2%
Only played with change (coins on hand/from a "Quarter Can")	****	2%
Nothing was ever successful	****	2%

 - indicates a difference in responses significant at the 90%+ confidence level ($p < 0.10$)

The key differences in successful control strategies, between those Regular VL Players who were at least partially successful in regaining control of their VL spending versus Problem VL Gamblers, tend to be related to willpower and self control when exposed to the machines. Those Regular Players who have had success are significantly more likely to attribute it to willpower (22% versus 3%) and their personal ability to either maintain reduced

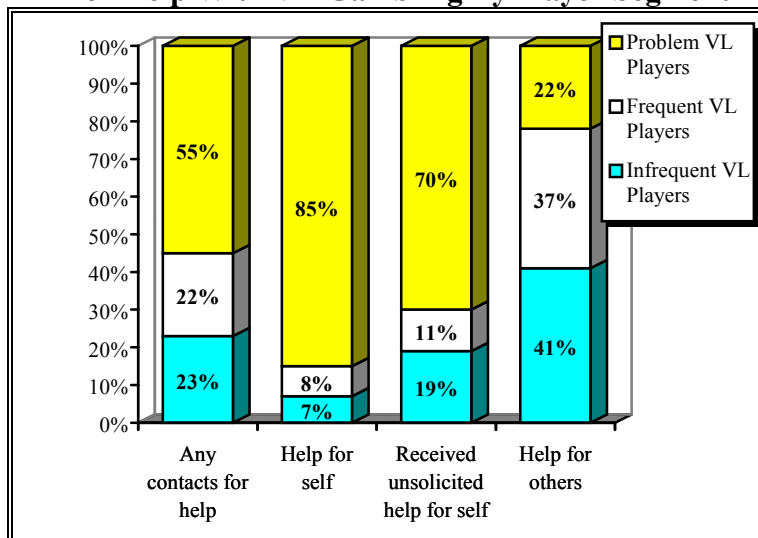
play levels (23% versus 3%) or to quit playing altogether (19% versus 3%), even though, for the most part, they continue to be exposed to the machines. For Problem Players who are still experiencing difficulties, both these strategies are relatively ineffective. In fact, they are twice as likely as players who have controlled their play to report that avoiding exposure by staying away from the machines altogether is an effective control strategy (21% versus 10%).

A similar percentage of players in both segments note that limiting their VL expenditures by setting a budget and controlling access to additional funds is usually a successful method of managing their VL play (26% versus 23%). However, for Problem Players, their ability to maintain this budget is compromised when they are actually playing the machines. They cannot rely on “willpower” to either reduce the length of time or frequency of their play. Their beliefs about the games (i.e., wins) and play habits are not consistent with a pre-set budget and, for the most part, they want to play whenever they are exposed to the games. Completely avoiding the machines is considered one way to avoid temptation. However, it is difficult unless one avoids most licensed establishments. Therefore, an “avoidance” strategy is destined to have limited success, particularly given the tendency for these Problem Players to frequent locations which have VLT’s.

“Abstinence” and budgeting strategies are judged to be most effective by the Problem VL Gamblers themselves, but they invariably have difficulty maintaining either. Thus, self control mechanisms in regard to VL gambling (i.e., self discipline, willpower) tend to be the distinguishing factors between success and failure.

3.10.5 Nature Of Contacts With Sources Of Help (Table 3.10.5 - Appendix D)

Graph 3.10.5a
Percentage Of Those Who Have Had Any Contacts For Help With VL Gambling By Player Segment



Overall, 10% of Regular VL Players report having sought information and/or assistance in order to get help in controlling their VL play.

When all those Regular VL Players who have sought assistance for themselves, for others or have received unsolicited help are considered, **Problem VL Gamblers account for just over half (55%) of all those who have had any contact with either formal (agencies, organizations, church, doctor, self help group) or informal (spouses, friends, family) sources of**

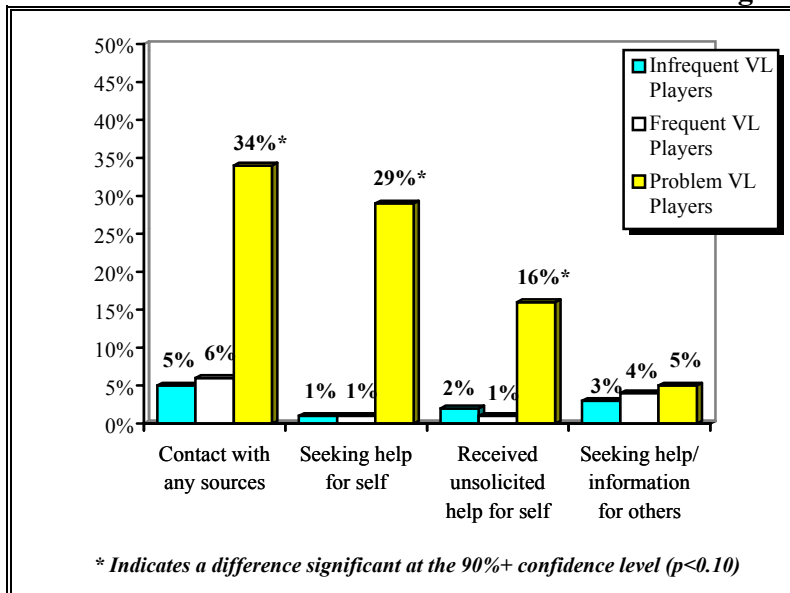
assistance regarding VL play. The remaining 45% of those Regular Players using any support services are evenly divided between Frequent (22%) and Infrequent Players (23%).

Current Problem VL Gamblers comprise the strong majority (85%) of these Regular Players specifically seeking assistance for their personal play of the machines. Not surprisingly, this group also comprises the majority (70%) of those who are receiving unsolicited assistance. This suggests that both formal and informal sources of aid for VL gamblers have been reasonably effective in identifying and targeting the Problem VL Gambler for assistance.

It is noteworthy that Infrequent and Frequent VL Players are most likely to be seeking assistance in order to help someone else control their video lottery play. Collectively, **the two non-problem player segments account for 78% of those Regular Players who contact sources in order to help others.**

This highlights the important role of other Regular Players who are likely the friends that Problem VL Gamblers turn to when they need help. This suggests that information campaigns can be effective, if aimed at all Regular Players, and the intent of such a campaign would be to educate players on how to help themselves and others. (It should be remembered that these are the same friends who are lending money to the Problem Players to continue VL play, thus, any campaign targeted to these players should also tell them how to help their Problem Player friends by not lending money to them.)

Graph 3.10.5b
Percentage Of Each Segment Who Have Had Contact With Sources For Assistance With VL Gambling



Approximately one-third (34%) of Problem Players have, at some time, had contact with any sources of help. In contrast, only 5% of Infrequent and 6% of Frequent Players have had any contact with help sources, and most of these players were initiating contact in order to assist someone else (3% of Infrequent Players and 4% of Frequent Players). Problem Players (5%) also have contacted sources to assist someone else, but the percentage is very low in comparison to the percentage

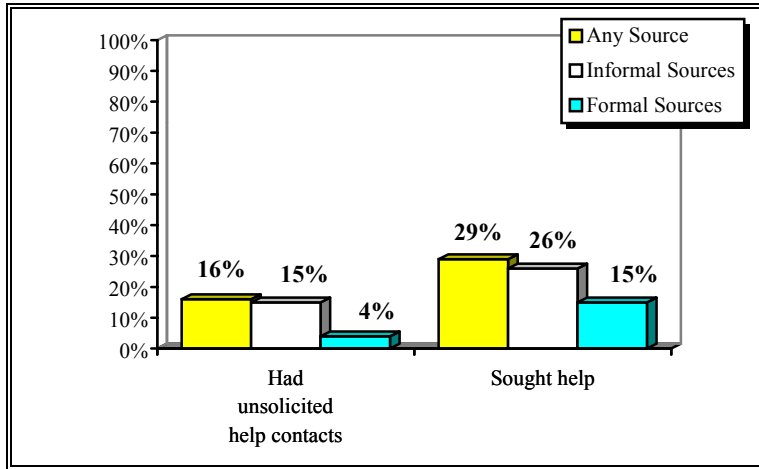
who have received unsolicited contacts, or have contacted the sources to seek help for themselves.

Problem Players comprise most (85%) of those Regular Players who seek out assistance from someone in order to help their problem play. Agencies can, therefore, assume that Regular Players who come to them for self help are likely Problem Players.

These results also confirm the effectiveness of the segmentation approach used in this study for identifying Problem Players. The Non-Problem Players have been shown to be the primary help

givers, while the Problem Players are the main help receivers (from other players, family and formal sources) and help seekers.

Graph 3.10.5c
Percentage Of Problem VL Players Who
Received Unsolicited Help Or Sought Help
From Formal & Informal Sources



Only 16% of Problem Players have ever had unsolicited contacts from any sources of help. Most of the unsolicited contacts have come from informal sources (15% of Problem Players) and relatively few from formal sources (4% of Problem Players). This suggests that those formal agencies seeking to provide help have yet to develop an effective identification and intervention program in order to offer unsolicited help to Problem Players. Given that only one-third of current Problem VL Gamblers have ever had contact

with any help sources, there is considerable potential value in developing an effective intervention program.

Problem Players are almost twice as likely (29%) to have sought help from sources as to have received unsolicited help (16%). Almost all of them (26% of Problem Players) have gone to informal sources, while half of them (15%) accessed formal sources of help.

The 15% of Problem VL Players seeking assistance outside of friends and family suggests that formal organizations have been somewhat effective in making people aware that they exist and are reachable and approachable. However, as was the case with intervention programs, and given the fact that 70% of Problem Players attempted to get their problem gambling under control within the last year, there is considerable room for a more rigorous effort to provide assistance to Problem VL Gamblers through formal channels.

The fact that informal sources have been contacted by 26% of Problem Players suggests that the formal sources of help must work with, and for, these people to help them help their friends, family or colleagues.

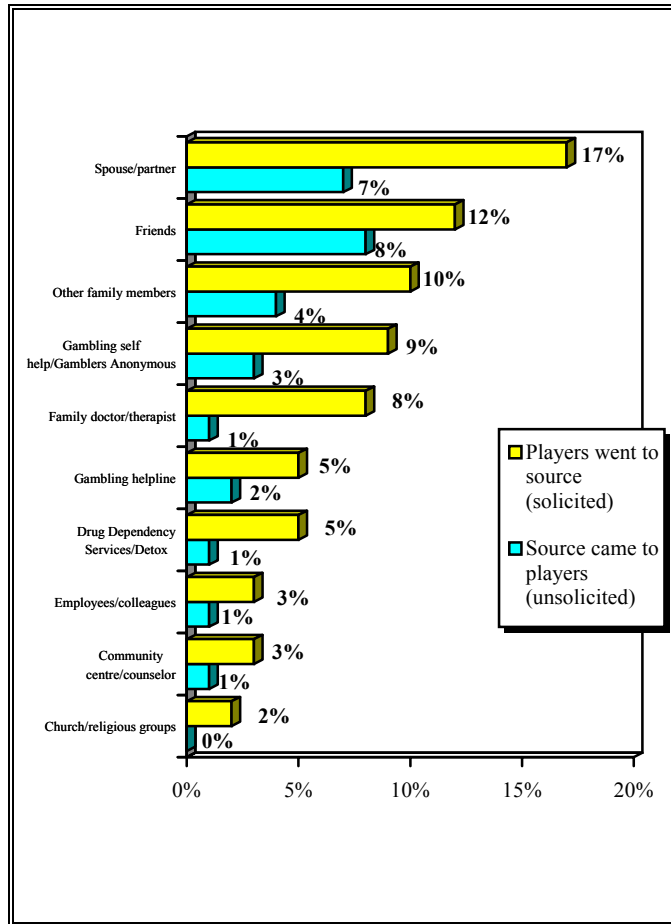
3.10.6 The Use & Value Of Specific Sources For Help Or Information

This section of the report addresses the issues of where Problem Players specifically go for help and/or information, and how useful they find these sources in solving their problem. The focus of this section is on Problem VL Players. It will be recalled that in Section 2.0 of the report, Provincial Overview of VL Play, Subsection 2.7 - Impact of Exposure to VL Play, the use and value of these sources was examined for Non-Players, Casual Players and Regular Players in the total population. While the analysis profiled formal and informal sources of assistance within the context of all adults in Nova Scotia, it is important to focus on the Regular VL Player base

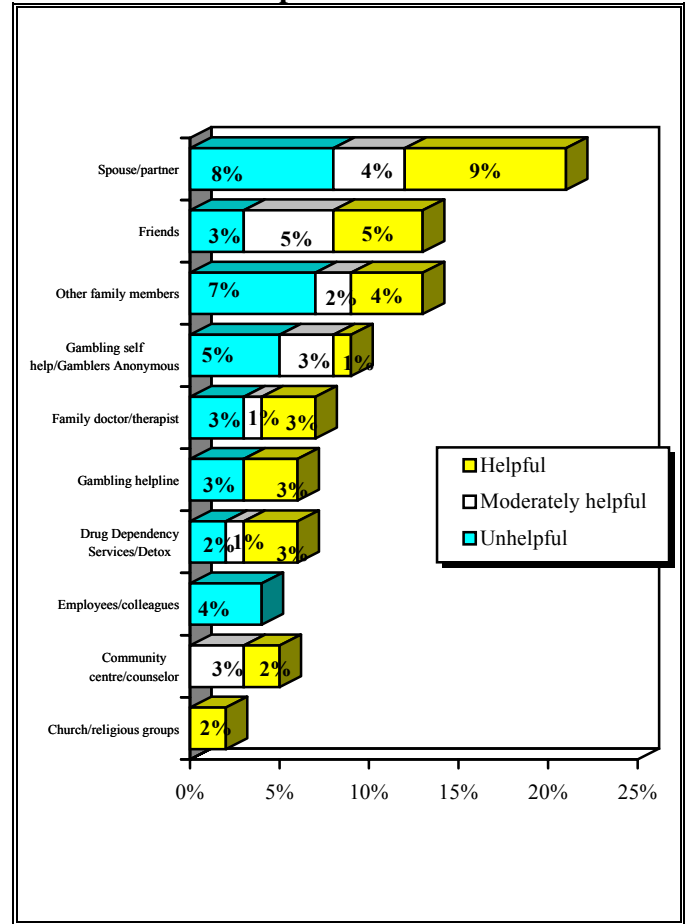
and, specifically, Problem Players, as it is these individuals who can best judge the value of the various sources of aid. Furthermore, Regular VL Players ultimately comprise the majority of those gamblers requiring assistance in the province, thus, the system must work for these individuals.

The majority (66%) of those currently characterized as Problem VL Gamblers have neither sought nor received any outside assistance in dealing with their problem play. It will be recalled that only approximately one-third (34%) of Problem VL Gamblers have had any contact with sources of help, with only 29% personally seeking any assistance from friends, family or institutions. When they do seek professional help, they report mixed results from the various sources such as Gamblers Anonymous and the Gambling Help Line. This is not particularly surprising since the Problem VL Gamblers in the study who have used any gambling support services are obviously still continuing to experience difficulties with their VL gambling. Therefore, any assistance they received from the various service providers has had limited or no impact on their VL gambling as yet. Simply by definition, those (past) Problem VL Gamblers who have *successfully stopped playing video lottery games* did not participate in the survey of Regular VL Players and, therefore, their responses are not included in the analysis. While the feedback from those adults who are currently involved in problem VL gambling offers valuable insight to service providers as to areas for improvement or further development, it only provides part of the picture. Through additional research, it will be necessary to include the responses of those who have managed to overcome their problem with video lottery gambling in order to adequately assess and evaluate the effectiveness of problem VL gambling interventions and treatment strategies.

Graph 3.10.6a
Use By Problem Players Of Help
& Information Sources



Graph 3.10.6b
Problem Player Rating Of Sources
Help & Information



In total, approximately one-quarter (26%) of Problem Players have turned to those who are close to them for help. Most often they seek help from a spouse or partner (17%), friends (12%) or other family members (10%). These people are also most likely to offer unsolicited assistance (family: 7%; friends: 8%; other family members: 4%). A small number (3%) sought help from their employer/colleagues, while only 1% received unsolicited help from employers/colleagues.

The perceived “helpfulness” of these sources is very mixed. Of the 21% who sought and/or received help from their spouse/partner, 9% say the assistance was helpful (rating 4 or 5 on a 5-point scale), 4% say the assistance was moderately helpful (rating 3 on a 5-point scale) and 8% say the assistance was not helpful (rating 1 or 2 on a 5-point scale). The results then are split pretty evenly between helpful and not helpful. The same is true for the helpfulness of friends (3% not helpful; 5% moderate helpfulness and 5% helpful) and other family members (7% not helpful, 2% moderately helpful and 4% helpful). The 4% who had assistance from their employer/colleagues rated them all as unhelpful.

It appears that friends and family can be helpful, in terms of assisting Problem VL Gamblers but, in many cases, they are not. Given their high involvement in the Problem

Players' attempts to solve their problem, it is important that they be targeted with assistance in helping the Problem Players.

There were 15% of Problem Players reporting they have sought help from more formalized agencies or support groups. Gambling self-help programs such as Gamblers Anonymous are mentioned most often, with 9% of Problem Gamblers reporting they have personally approached such a group for assistance. An additional 3% of Problem Gamblers noted a self-help group had initiated contact with them. Only 1% of Problem Players have sought help for someone else through a self-help group.

Of the sample of sixteen respondents who have dealt with a self help organization (11 of whom are Problem VL Players), only one individual rated the help received as extremely helpful (5/5), with six giving them a moderate rating (3/5) and nine rating them as relatively ineffective (1 or 2/5) in terms of helpfulness.

While a sample of sixteen respondents is small, it is a random sample and, therefore, provides valuable insight, although within segment estimates have higher variance. **The results for self help groups are highly skewed toward the negative end of the scale. At the very best, this suggests these organizations may not be of great help to those Problem VL Players who currently are still playing the machines.**

Family doctors/therapists have been contacted by 8% of Problem Players, with perceptions evenly split between helpful (3%) and relatively unhelpful (3%). **Supplying doctors with information designed to help these professionals provide assistance to Problem VL Players would be useful, as they are a frequent source of help, but have limited success in providing the necessary assistance.**

The Gambling Help Line had only been in service for almost a year at the time of this survey, and it had already been contacted by 5% of Problem VL Gamblers. It, too, had mixed results, with half of those who contacted the help line believing it was helpful and half indicating it was unhelpful. Presumably, follow-up with contacts will fine-tune the assistance process and improve the effectiveness of the program over time.

Problem VL Players have also turned to Drug Dependency Services for help (5%). As was the case for most other sources of help, indications are that the Drug Dependency Services have varied perceptions of success, with 3% rating it as helpful and 2% giving the services a low rating for helpfulness.

Community centres/counselors and churches/religious groups (2%) are approached by very few of the Problem Gamblers, although in both cases some Problem Gamblers (2%) have rated their advice as helpful.

It is noteworthy that, overall, 15% of all Regular VL Players responded positively towards having a brochure or flyer available at VLT locations which would explain methods of controlling video lottery expenditures. Problem VL Gamblers were four times more likely to feel this would be helpful, with 40% responding favourably towards the concept versus

9% to 11% for the other player segments. This suggests such a publication would effectively target those VL gamblers most likely to benefit from expenditure controls. Distribution at VLT locations through the cooperation of staff on premises ensures the appropriate individuals will be reached. In combination with other training or information sessions for staff at VLT sites, a pamphlet provides something tangible they can provide to those exhibiting problem play behaviours.

Given that the individuals rating these sources of help are still Problem VL Players, it is to be expected that many of them did not find these sources of assistance helpful. However, almost all of these sources were rated as helpful by at least some of the Problem VL Gamblers who assessed the assistance. The Prochaska and DiClemente Stages of Change model suggests that those who are addicted will likely stop many times before they stop for good. Therefore, the **Problem Players will likely return to sources they have previously accessed for help, particularly to those they have found to be helpful in the past. It also means that, if a “source” has been in contact with a Problem VL Player, they need to establish a communication link with that individual. They then can either persuade that player to try to stop or control their play again, or be easily accessible to offer support when the Problem Player decides to try “one more time” to stop.**

APPENDIX A

GENERAL POPULATION SURVEY

98-0016

NOVA SCOTIA GENERAL POPULATION SURVEY
(VLT Study)

SURVEY I.D. _____

ANY VL PLAYER(S) _____

INT. I.D. _____

Hello, my name is _____ from Focal Research, a professional research firm located in Halifax, Nova Scotia. We are conducting a research study with adults across Nova Scotia. To make sure men and women have an equal chance of participating in our survey, if your telephone number ends in an odd number, we must ask to speak with a male member of your household and if your telephone number ends in an even number, we must ask to speak to a female. In this case, may I please speak to a male/female who is 19 years of age or older and is a member of this household? **(Refer to Interviewer Supplement to provide further information on respondent selection.)**

IF NOT AVAILABLE - Is there a good time I can call back to reach the correct person? Whom should I ask for? **(WRITE ON RECORD OF CALL SHEETS)**

We would like to assure you your answers are anonymous and confidential, and the information gathered is used for research purposes only. However, there is a preliminary question I must ask you first.

A. Do you or does anyone in your household or immediate family work in any of the following:

	YES	NO
Marketing Research	[]	[]
Any Media (radio, TV, print)	[]	[]
Political Party or Lobby Group	[]	[]

IF YES TO ANY ABOVE - THANK & END CALL

Focal Research is conducting this study for the Government of Nova Scotia to accurately determine the levels of play of various games of chance in the province. Focal is doing the research because we are independent from the government and this ensures respondents will remain anonymous. The survey will take approximately 10 - 15 minutes and your participation is greatly appreciated. Is this a convenient time for you to take part?

9a. How often do you tend to play the following games of chance for which you can win money: **(READ LIST) (RECORD CODE BELOW)**

- Regularly (Once a month or more) 4
- Occasionally (Once every few months) 3
- Rarely (Once or twice a year) 2
- Less often than once a year 1
- Never 0

9b. **IF >0:** Approximately how much did you spend in the last month on this type of gaming?
(ROUND TO THE NEAREST DOLLAR)

Spent		a) Frequency	b) Amount
		of Play	Last Month
1) Lottery Draws, including 6/49	1)	_____	_____
2) \$1.00 Scratch and Win tickets	2)	_____	_____
3) \$2.00 Scratch and Win tickets	3)	_____	_____
4) Breakopen/Pull-Tab tickets (50¢)	4)	_____	_____
5) Charity Raffles/Draws	5)	_____	_____
6) Bingo for money (excluding Lotto Bingo)	6)	_____	_____
7) Horse Races	7)	_____	_____
8) Sport Select Proline - Sports Lottery	8)	_____	_____
9) Other Sports Bets/Pools	9)	_____	_____
10) Cards/Card Games for money outside of a casino	10)	_____	_____
11) Slot Machines at a Casino	11)	_____	_____
12) Any other games at casino excluding slot machines(roulette, blackjack, etc.)	12)	_____	_____
13) Any other types of betting/gambling excluding VLT's (e.g., dog races, off-track betting)	13)	_____	_____
14) (None of the above)	14)	_____	_____

1. Have you ever played video lottery games?

YES

1 - CONTINUE

NO

0 - GO TO Q # 16a (Page 3)

2. Approximately how much did you spend in the last month, out-of-pocket, on video lottery games, **not including winnings?**

10. Compared to other games of chance you can play for money, how much do you like video lottery games on a scale of one to five, where one means you like them much less and five means you like them much more than other games of chance.

Like Less Than Other Games					Like Much More Than Other Games	
1	2	3	4	5		_____

3. How often do you tend to play video lottery games? Would that be...

Daily	6 - GO TO Q # 55a	
Weekly (Once a week or more)	5 - GO TO Q # 55a	
Regularly (Once a month or more)	4 - GO TO Q # 55a	
Occasionally (Once every few months)	3 - CONTINUE	
Rarely (Once or twice a year)	2 - CONTINUE	
Less often than once a year	1 - CONTINUE	_____

4a. **IF LESS THAN ONCE PER MONTH:** In the past, have you ever played video lottery games on a regular basis? This means once a month or more on average.

YES	1 - CONTINUE	
NO	0 - GO TO Q # 55a	_____

4b. How long ago did you stop playing VLT games on a regular basis? **(READ LIST)**

Within the last month	5	
Within the last three months	4	
Within the last six months	3	
Within the last year	2	
More than one year ago	1	_____

4c. Why did you stop playing VLT games on a regular basis?

55a. Has anyone ever told you they were concerned with how much time or money you were spending on video lottery games?

YES	1	
-----	---	--

NO 0 _____

55b. Have you ever felt you were spending more money or time playing VLT games than you should?

YES - More Money 1
 YES - More Time 2
 YES - Both 3 _____
 NO 0

16a. As you know, video gambling machines can be found in a wide variety of locations such as legion halls, sporting establishments, private clubs, bars and licensed restaurants. In the last month, approximately how many times were you in a location which had video lottery machines?

59. Do you have (close) friends who play video lottery games regularly?

YES 1
 NO 0 _____

60. Do any members of your family or close relatives (household) play video lottery games regularly?

YES 1
 NO 0 _____

61. Do you work or attend school outside the home?

YES - Work 1 - **CONTINUE**
 YES - School 2 - **CONTINUE**
 YES - Both 3 - **CONTINUE** _____
 NO 0 - **GO TO Q # 63 (Page 5)**

62a. Are there any VL machines where you work or go to school, either on the premises or located nearby?

On premises 1
 Located nearby 2
 Both 3 _____
 Neither 4
 Don't Know 9

62d. Do you have any co-workers or fellow students who play video lottery games on a regular basis?

YES 1
 NO 0 _____

Don't Know 9

62e. Do you travel for business purposes?

YES 1

NO 0

63. Now, we are going to ask you how you spend your time in an average week. For each of the following activities, please indicate approximately how much time you spend on that activity in an average week. **(PROBE: We realize that it is difficult to be exact so please just give us your best guess as to how many hours or minutes you spend on each activity in an average week.)**

hours : minutes

1) Watching TV (not including video tapes) _____ : _____

2) Relaxing at home (playing music, reading, gardening, etc.) _____ : _____

3) Involved with hobbies/crafts/special interest (e.g., woodworking, playing a musical instrument, sewing, tole painting) _____ : _____

4) Socializing with friends/family at your home _____ : _____

5) Socializing with friends/family at their homes _____ : _____

6) Socializing with friends/family at bars _____ : _____

7) Socializing with others by playing sports, involvement in volunteer organizations or other recreational activities _____ : _____

8) Playing video lottery games/machines _____ : _____

9) Playing games not for money (cards, video games, computer games, board games) _____ : _____

10) Playing games to win money (excluding VL games) _____ : _____

11) Working at your job (at work) _____ : _____

12) **(IF IN THE WORKFORCE)** Working at your job (at home) _____ : _____

13) Doing household chores _____ : _____

64. Could you please tell me approximately how many times you participate in each of the following activities in an average month?

of times/month

1) Go out to visit family _____

2) Go out to visit friends _____

- 3) Go to Church/Synagogue _____
- 4) Rent or watch video tapes _____
- 5) Go out to movies _____
- 6) Eat out at restaurants (not during work hours) _____
- 7) Travel for business/pleasure (days of travel) _____
- 8) Attend live sports events _____
- 9) Attend live entertainment (concerts, theatre) _____
- 10) Go to the library, museum, zoo or other types of historic, educational or entertainment sites _____
- 11) Are involved in community clubs or organizations (such as Scouts, Guides, Kiwanis, Lions, Community Groups) _____
- 12) Are involved in other volunteer work _____

65. Excluding video lottery games and other games of chance played for money, approximately how much money do you spend each month on entertainment activities?


66. On average, how often would you say you go to a bar, club, pub or lounge? **(READ LIST)**
- | | | |
|------------------------|---|-------|
| More than once a week | 5 | |
| Once a week | 4 | |
| Every two weeks | 3 | _____ |
| About once a month | 2 | |
| Less than once a month | 1 | |
| Do not go | 0 | |

- 38a. Which of the following best describes your smoking habits? **(READ LIST)**
- | | | |
|----------------|---|-------|
| Non-Smoker | 0 | |
| Social Smoker | 1 | |
| Regular Smoker | 2 | _____ |

- 5a. Do you personally know of someone in Nova Scotia who has had a problem with video lottery gambling or not?
- | | | |
|------------|-----------------|-------|
| YES | 1 - CONTINUE | |
| NO | 0 - GO TO Q # 6 | |
| Don't Know | 9 - GO TO Q # 6 | _____ |

5b. **IF YES:** Which of the following best describes your relationship to this person/these people you know who have a problem with video lottery gambling? **(READ LIST)**
(MORE THAN ONE RESPONSE ALLOWED)

- | | | |
|---|---|-------|
| Self | 1 | _____ |
| Household family member | 2 | _____ |
| Household non-family member
(friend/room-mate) | 3 | _____ |
| Immediate family - not in household
(brother, sister, parents, grandparents) | 4 | _____ |
| Other family - not in household
(uncle, aunt, cousins) | 5 | _____ |
| Others - non-household/non-family members
(friends, acquaintances) | 6 | _____ |

 6. Have you ever told someone else (such as a friend or family member) that you were concerned with how much time or money they were spending on video lottery games?

- | | | |
|-----|---|-------|
| YES | 1 | |
| NO | 0 | _____ |

Demographics

68. In what year were you born?

Specify: _____

69a. Including yourself, how many people live in your household?

_____ (IF ONE - GO TO Q # 70)

69b. Are there any other adults in your household, 19 years of age or older, who play video lottery games either... (SPECIFY HOW MANY)

Occasionally _____
once every few months or so

OR

On a regular basis _____
of once a month or more

(TOTAL CANNOT EQUAL MORE THAN Q # 69a)

69c. How many children in your household are under 19 years of age?

70. What is your current marital status? (READ LIST)

- Single 1
- Married/Cohabiting/Living with a partner 2
- Divorced/Widow/Separated 3

71. Which of the following best describes your current work status?

- Working Full-time 1 - CONTINUE
- Working Part-time 2 - CONTINUE
- Unemployed 3 - GO TO Q # 73
- Student 4 - GO TO Q # 73
- Homemaker 5 - GO TO Q # 73
- Retired 6 - GO TO Q # 73
- Disabled 7 - GO TO Q # 73

72. What is your current occupation (i.e. the type of work you do)?

73. Which of the following best describes the highest level of education you have completed?

- Less than Grade 9 1
- Grade 9 - 13 2
- Trade School/Non-University 3
- University without degree 4
- University with degree 5
- University post-graduate degree 6
- Refused 7

74a. Which of the following broad income categories best describes your total annual household income (that is, everyone combined, before taxes)?

- Less than \$10,000 1
- \$10,000 - \$25,000 2
- \$25,001 - \$35,000 3
- \$35,001 - \$45,000 4
- \$45,001 - \$60,000 5
- \$60,001 - \$75,000 6
- Over \$75,000 7
- Refused 8 - GO TO Q # 75
- Don't Know 9 - GO TO Q # 75

74b. How many individuals contributed to this income?

75. What language is your mother tongue?

- English 1
- French 2
- English/French 3
- Other _____ 4

76. What are the first three digits of your postal code?

77. **INTERVIEWER ONLY:**

- Male 1
- Female 2

CLOSING STATEMENT

This completes your participation in our study, however, we would like to ask if you are interested in being part of an ongoing confidential research panel. You may be contacted in order to get your opinions on various issues or concepts. This would give you an opportunity to have direct input on something which affects you and/or someone you know. Your participation is voluntary and completely confidential. As members of the Professional Marketing Research Society and the Better Business Bureau, we guarantee that any information you provide will be used for research purposes only. Is this something you could help us with?

YES 1

NO 0

IF YES: May I ask for your first name to keep in our panel? _____

You may receive a quality control check. My supervisor calls back 10% to 15% of all my completed surveys to ensure you were comfortable participating in our study and that I was doing my job properly. May I please confirm your telephone number? **IF "NO" TO PANEL:** May I ask your first name so my supervisor would know who to ask for?

TELEPHONE #: _____ DATE: _____

INTERVIEWER: _____ SUPERVISOR: _____

DATA ENTRY: _____ QCC: _____

On behalf of Focal Research, I would like to thank you for your participation. Your contribution to our research is greatly appreciated.

IF ANY VLT PLAYERS IN HOUSEHOLD - NOTE HOW MANY ON FRONT OF SURVEY

APPENDIX B

VL PLAYERS' SURVEY



SURVEY I.D. _____

HOUSEHOLD I.D. _____

RESP. I.D. _____

Interviewer Name: _____

INT. I.D. _____

Could I ask you a couple of preliminary questions first?

1a. Referring to the past three months, and excluding any play of video gambling machines at casinos, on average, how often have you played video lottery games? (READ LIST. SPECIFY # OF TIMES PER - This would be including those occasions when you play more than once per day)

Once a week or more (Specify) 1 Specify Total # of Times _____

Once a month or more (Specify) 2 Specify Total # of Times _____

Less than once a month (Specify) 3 - Thank & Terminate - Go To Household Screener

1b. In that same three months, how often have you played video gambling machines at casinos in Nova Scotia?

Specify Total # of Times: _____

2. Approximately how long have you been playing video lottery games once a month or more? (CONVERT TO MONTHS)

Specify: Years _____

OR

Months _____

3a. Do you have one or more regular locations where you usually play video lottery games once a month or more?

YES

1 - CONTINUE

NO

0 - GO TO Q # 3d _____

3b. IF YES: Specify how many.

3c. How many of these regular locations are close to your home?

3d. During the last three months, at how many other different locations did you play any video lottery games? This would be excluding your regular location. (**NONE = 0**)

4. How often do you play at any of the following types of locations in Nova Scotia, using a scale of never, rarely, occasionally or regularly? First of all... (**READ LIST**)

	Never	Rarely	Occasionally	Regularly (Once +/-month)	D/K	
a) Legion/community centers	0	1	2	3	9	_____
b) Sporting establishments (such as pool halls, bowling alley, curling, golf courses)	0	1	2	3	9	_____
c) Airports	0	1	2	3	9	_____
d) Bars, pubs, lounges, licensed restaurants (other than airports)	0	1	2	3	9	_____
e) Native gambling establishments	0	1	2	3	9	_____
f) Other locations	0	1	2	3	9	_____

5a. In the last three months, have you played video lottery games in more than one location in a single day?

- YES 1 - **CONTINUE**
- NO 2 - **GO TO Q # 6**

5b. **IF YES:** How often does this happen? (**READ LIST**)

Rarely (less than 25% of the time)	1	
Occasionally (25% to 50% of the time)	2	
Frequently (50% or more)	3	_____
Almost every day you play (≈100% of the time you play)	4	
(Don't Know)	9	

6. Again, referring to the last three months, on average, approximately how much did you spend, out of pocket, per week (per month) on video lottery games, **NOT INCLUDING**

WINNINGS?

Per Week: _____ . _____

Or

Per Month: _____ . _____

7a. Since you first started playing VL games, have you ever purposely **stopped** or **tried to stop** playing the games for an extended time period?


- | | | |
|---------------------|-------------------------|-------|
| YES - Stopped | 1 - CONTINUE | |
| YES - Tried to stop | 2 - CONTINUE | |
| YES - Both | 3 - CONTINUE | _____ |
| NO | 0 - GO TO Q # 7d | |

7b. Approximately how often in the past have you gone through periods when you stopped or tried to stop playing? (**READ LIST**)

- | | | |
|------------------------|---|-------|
| Once or twice ever | 1 | |
| Once or twice per year | 2 | |
| Once every few months | 3 | _____ |
| Once a month or more | 4 | |

7c. When did you last stop or try to stop playing? (**READ LIST**)

- | | | |
|------------------------------|---|-------|
| On-going | 5 | |
| Within the last three months | 4 | |
| Within the last six months | 3 | _____ |
| Within the last year | 2 | |
| More than one year ago | 1 | |

 7d. Since you first started playing VL games, have you ever **reduced** or **tried to reduce** the amount of time and/or money you spent playing VL games?

- | | | |
|-----------------------|-------------------------|-------|
| YES - Reduced | 1 - CONTINUE | |
| YES - Tried to reduce | 2 - CONTINUE | |
| YES - Both | 3 - CONTINUE | _____ |
| NO | 0 - GO TO Q # 8a | |

7e. Approximately how often in the past have you gone through periods when you reduced or tried to reduce your VL play? **(READ LIST)**

- Once or twice ever 1 _____
- Once or twice per year 2 _____
- Once every few months 3 _____
- Once a month or more 4 _____

7f. When did you last reduce or try to reduce your VL play? **(READ LIST)**

- On-going 5 _____
- Within the last three months 4 _____
- Within the last six months 3 _____
- Within the last year 2 _____
- More than one year ago 1 _____

8a. Are there any specific situations where you spend too much time or money playing VL games?

- YES 1 - CONTINUE _____
- NO 0 - GO TO Q # 9a _____

8b. **IF YES:** What types of situations would this be?

8c. Referring to the last three months, how often did you find yourself in these situations? **(READ LIST)**

- Never (0%) 0 _____
- Rarely (<25%) 1 _____
- Occasionally (≈25% to 50%) 2 _____
- Frequently (50% +) 3 _____
- Always (≈100%) 4 _____

9a. How often do you tend to play the following games of chance for which you can win money: **(READ LIST) (RECORD CODE BELOW)**

- Regularly (Once a month or more) 4
- Occasionally (Once every few months) 3
- Rarely (Once or twice a year) 2
- Less often than once a year 1
- Never 0

9b. **IF >0:** Approximately how much did you spend in the last month on this type of gaming?
(ROUND TO THE NEAREST DOLLAR)

Spent		a) Frequency	b) Amount
		of Play	Last Month
1) Lottery Draws, including 6/49	1)	_____	_____
2) \$1.00 Scratch and Win tickets	2)	_____	_____
3) \$2.00 Scratch and Win tickets	3)	_____	_____
4) Breakopen/Pull-Tab tickets (50¢)	4)	_____	_____
5) Charity Raffles/Draws	5)	_____	_____
6) Bingo for money (excluding Lotto Bingo)	6)	_____	_____
7) Horse Races	7)	_____	_____
8) Sport Select Proline - Sports Lottery	8)	_____	_____
9) Other Sports Bets/Pools	9)	_____	_____
10) Cards/Card Games for money outside of a casino	10)	_____	_____
11) Slot Machines at a Casino	11)	_____	_____
12) Any other games at casino excluding slot machines(roulette, blackjack, etc.)	12)	_____	_____
13) Any other types of betting/gambling excluding VLT's (e.g., dog races, off-track betting)	13)	_____	_____
14) (None of the above)	14)	_____	_____

10. Compared to other games of chance you can play for money, how much do you like video lottery games on a scale of one to five, where one means you like them much less and five means you like them much more than other games of chance.

Like Less Than Other Games					Like Much More Than Other Games
1	2	3	4	5	_____

11. During the past three months, which video lottery games have you played on a regular basis?

_____	_____
_____	_____
_____	_____

12a. Which days of the week do you typically play video lottery games?

Monday	01	_____	_____
Tuesday	02	_____	_____
Wednesday	03	_____	_____
Thursday	04	_____	_____
Friday	05	_____	_____
Saturday	06	_____	_____
Sunday	07	_____	_____
Most Days/Every Day	08 - ASK BOTH Q # 12b & Q # 12c	_____	_____
No Particular Day	09 - ASK BOTH Q # 12b & Q # 12c	_____	_____

12b. **(IF WEEKDAY MENTIONED IN Q 12a)** Is there a time of day during the week that you often play the games? **(READ LIST IF NECESSARY)**

12c. **(IF WEEKEND MENTIONED IN Q 12a)** Is there a time of day during the weekend that you often play the games?


	b) Weekdays	c) Weekend
Mornings (9:00 a.m. - 11:30 a.m.)	1 _____	1 _____
Lunchtime (11:30 a.m. - 2:00 p.m.)	2 _____	2 _____
Afternoons (2:00 p.m. - 4:30 p.m.)	3 _____	3 _____
Suppertime (4:30 p.m. - 7:00 p.m.)	4 _____	4 _____
Early Evening (7:00 p.m. - 10:00 p.m.)	5 _____	5 _____
Late Evening (after 10:00 p.m.)	6 _____	6 _____
Varies/No Particular Time	7 _____	7 _____
Other _____	8 _____	8 _____
Don't Play on Weekdays/Weekends	9 _____	9 _____

13a. When you are in a location playing video lottery games, do you tend to play only once or do you tend to play more than once during the course of a single visit with stops or breaks in between playing times?

Play once 1 - **GO TO Q # 14**
 Play more than once 2 - **CONTINUE** _____

13b. On average, how many times do you play during each visit?

Specify: _____

 14. During the past month, on average, how much did you spend each time you played? Again, this is out-of-pocket, not including winnings.

15. In the past month, on average, how long did you tend to play video lottery games each time you played?

Specify: _____ Minutes: _____

16a. As you know, video gambling machines can be found in a wide variety of locations such as legion halls, sporting establishments, private clubs, bars and licensed restaurants. In the last month, approximately how many times were you in a location which had video lottery machines?

16b. Of these _____ times you were in a location with video lottery games, how many times were you there to specifically play the games?

16c. Of these _____ times, how many times did you go to the location for another reason but ended up playing video lottery games while you were there?

NOTE: Q 16b PLUS Q 16c must be less than or equal to Q 16a

17. When you go some place and play video lottery games, how much of the time you are there do you actually spend playing the machines? On average, would you say one-quarter or less, half, three-quarters or almost all of the time you are in these locations is usually spent playing the games?

- One-quarter or less 1 _____
- Half 2 _____
- Three-quarters 3 _____
- Almost all 4 _____
- (Varies) 8 _____

18. Based on your play over the last 3 months, how often do you finish (stop) playing for each of the following reasons? Would it be never, rarely (<25%), occasionally (25% to 50%), frequently (50% +) or almost always (≈100%)? **(ROTATE ORDER)**

	Never	Rarely	Occasion-ally	Frequently	Almost Always	D/K	
() 1) You spent your budgeted amount of money	0	1	2	3	4	9	_____
() 2) You hit a certain credit level	0	1	2	3	4	9	_____
() 3) You run out of credits on the machine	0	1	2	3	4	9	_____
() 4) You spent all the cash you have available	0	1	2	3	4	9	_____
() 5) You spent your planned amount of time playing	0	1	2	3	4	9	_____
() 6) You lost interest in playing or got bored	0	1	2	3	4	9	_____
() 7) The location/establishment is closing	0	1	2	3	4	9	_____
() 8) To give someone else a chance to play	0	1	2	3	4	9	_____
() 9) To eat or drink	0	1	2	3	4	9	_____
() 10) Friends or family have arrived or to socialize with friends or family	0	1	2	3	4	9	_____
() 11) To play pool or dance	0	1	2	3	4	9	_____
() 12) Because friends or family are leaving	0	1	2	3	4	9	_____

19a. Over the last three months do you think you personally broke even, lost a little, lost a lot, won a little or won a lot when you played video lottery games?

- Lost A Lot 1 - **CONTINUE**
- Lost A Little 2 - **CONTINUE**
- Broke Even 3 - **GO TO Q # 20a**
- Won A Little 4 - **CONTINUE**
- Won A Lot 5 - **CONTINUE**
- Don't Know 9 - **GO TO Q # 20a**

19b. **IF NOT BROKE EVEN:** Over the last three months, how much would you say you have lost/won? (**ROUND TO NEAREST DOLLAR**)

☞ 20a. What is the largest amount you have ever won at one time playing video lottery games?

20b. What is the largest amount you have ever lost at one time playing video lottery games?

21. Why do you play video lottery games? (**PROBE FOR MAIN REASONS - ANY OTHER REASONS**)

22. Now, I'm going to read you a series of statements about video lottery and I would like you to tell me whether you agree or disagree with each one. Using a scale of 1 to 5 where 1 means strongly disagree and 5 means strongly agree, how much do you agree or disagree with each of the following: **(ROTATE ORDER AT DESIGNATED POINTS)**

	Strongly Disagree				Strongly Agree	
() 1) I consider myself to be a serious VL player	1	2	3	4	5	_____
2) I find playing VL games to be an enjoyable part of a visit to an establishment	1	2	3	4	5	_____
3) Sometimes I am depressed that I play VL games	1	2	3	4	5	_____
4) I would prefer VL machines were only available in 3 or 4 restricted places within Nova Scotia	1	2	3	4	5	_____
5) I sometimes feel guilty about how much <u>time</u> I spend playing VL games	1	2	3	4	5	_____
6) Everyone has the same chance of winning when they play the VL line games such as Swinging Bells	1	2	3	4	5	_____
7) I spend time thinking about VL play when I'm not playing	1	2	3	4	5	_____
8) I play video lottery games to forget my troubles or worries	1	2	3	4	5	_____
9) I really enjoy playing VL games	1	2	3	4	5	_____
() 10) I would like to play VL games almost everyday	1	2	3	4	5	_____
11) I consider myself knowledgeable in how best to play and win some VL games	1	2	3	4	5	_____
12) I can give up playing VL games any time I want to	1	2	3	4	5	_____
13) After a string or series of losses playing VL games I feel I am more likely to win	1	2	3	4	5	_____
14) Most times I am in a place that has the machines I want to play them	1	2	3	4	5	_____
15) I have friends or family members who worry or complain about me playing VL games	1	2	3	4	5	_____
16) I feel I can improve my chances of winning by using certain strategies or betting systems	1	2	3	4	5	_____

Q # 22. continued	Strongly Disagree					Strongly Agree
17) Playing VL games is a great way to pass time with friends	1	2	3	4	5	_____
18) I sometimes find it hard to stop playing video lottery games, when I know I should	1	2	3	4	5	_____
19) I sometimes play VL games with the hope of paying off my debts/bills	1	2	3	4	5	_____
20) I sometimes feel anxious, restless or irritable because I can't play VL machines when I want to	1	2	3	4	5	_____
21) My VL play has put a strain on my relationships at home	1	2	3	4	5	_____
22) My friends and I enjoy playing VL games when we go out together	1	2	3	4	5	_____
() 23) I would like to spend most of my extra money on video lottery games	1	2	3	4	5	_____
24) I have lied about my VL gambling	1	2	3	4	5	_____
25) Video lottery games are a fun and entertaining way for me to pass time	1	2	3	4	5	_____
26) I sometimes feel guilty about the amount of <u>money</u> I spend on VL games	1	2	3	4	5	_____
27) I sometimes get frustrated when people tie up the machines	1	2	3	4	5	_____
28) I sometimes have trouble sleeping thinking about VL games	1	2	3	4	5	_____
29) I usually feel I'm going to win when I start playing VL games	1	2	3	4	5	_____
30) I sometimes spend money on video lottery games that was meant for some other purpose	1	2	3	4	5	_____
31) I generally feel that over time VL will pay off for me	1	2	3	4	5	_____
32) I often spend more <u>time</u> playing VL games than I intend to	1	2	3	4	5	_____
33) I wish I could play VL games more often	1	2	3	4	5	_____

23a. Do you tend to have a spending limit or budget for playing video lottery games where you decide how much money you plan to spend out-of-pocket before sitting down to play the games?

YES 1 - CONTINUE
NO 0 - GO TO Q # 24a

23b. IF YES, do you set your limit on a weekly basis, monthly basis or on a per time basis?

23c. How much is your limit?

			b)	c)
OR	Per Time (Specify Amt.)	1	_____	_____
OR	Per Week (Specify Amt.)	2	_____	_____
	Per Month (Specify Amt.)	3	_____	_____

23d. How often in the past six months have you exceeded this budget? (READ LIST)

Never exceed budget	0
Rarely (<25%)	1
Occasionally (25% to 50%)	2
Frequently (50% +)	3
Always (≈100%)	4

👉 24a. What other strategies or actions do you use to keep your spending under control each time you play?

Have no strategies	00 - GO TO Q # 24c
Have no problem and therefore do not need to control spending	01 - GO TO Q # 24c

24b. **FOR EACH MENTION ABOVE:** How successful are these strategies in keeping your spending under control each time? Would you say they are usually successful, sometimes successful or not usually successful?

<u>a) Usually</u>	<u>b) Sometimes</u>	<u>c) Usually Not</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

24c. Do you know of any other strategies or actions that other people have that help them keep their spending under control each time?

None	00
_____	_____
_____	_____
_____	_____

25a. Do you cash out once you have reached a certain amount of winnings or dollar amount?

YES	1 - CONTINUE	_____
NO	0 - GO TO Q # 25d	_____

25b. **IF YES,** On average, what dollar amount is that?

_____	_____
_____	_____

25c. How often, when you cash out, do you then continue to play? **(READ LIST)**

Never (0%)	0	_____
Rarely (<25%)	1	_____
Occasionally (25% to 50%)	2	_____
Frequently (50% +)	3	_____
Almost Always (≈100%)	4	_____

25d. In general, out of all the times you played VL games during the past three months, approximately how often did you cash out and then continue to play? **(READ LIST)**

Never (0%)	0	
Rarely (<25%)	1	
Occasionally (25% to 50%)	2	_____
Frequently (50% +)	3	
Almost Always (≈100%)	4	

26. What are you likely to do with your winnings for a \$20.00 win? b) \$50.00? c) \$100.00? **(READ LIST - MORE THAN ONE RESPONSE ALLOWED)**

	a) \$20.00	b) \$50.00	c) \$100.00
Spend on more VL play	1 _____	1 _____	1 _____
Buy drinks/alcohol	2 _____	2 _____	2 _____
Spend it on something else	3 _____	3 _____	3 _____
Pocket it	4 _____	4 _____	4 _____
(Don't Know)	9 _____	9 _____	9 _____

27a. What bet level, that is, number of credits do you prefer to play at for each play or spin?

of credits

27b. How much is each credit worth?

value of credit

_____ ¢

27c. Do you ever feel you must have all bets covered when you play line games such as Swinging Bells?

YES	1	
NO	0	
Not Applicable	8	_____

27d. How often do you play max bet, that is, you bet the maximum amount possible each play? **(READ LIST)**

- Never (0%) 0 _____
- Rarely (<25%) 1 _____
- Occasionally (25% to 50%) 2 _____
- Frequently (50% +) 3 _____
- Almost all the time (≈100%) 4 _____

28. Would you say the **chances** of winning depend on any of the following? **(ROTATE ORDER)**

	YES	NO	D/K	
() a) The make of the machine such as Spielo or VLC?	1	0	9	_____
() b) The particular type of VL game such as Swinging Bells or Aces Fever?	1	0	9	_____
() c) The time of day?	1	0	9	_____
() d) The day of the week?	1	0	9	_____
() e) How recently someone won at that machine?	1	0	9	_____
() f) The size of the bonus if there is one?	1	0	9	_____
() g) Where you play, that is, some places have machines that are more likely to win?	1	0	9	_____
() h) The machine, that is, specific machines are more likely to provide wins?	1	0	9	_____
() i) The size of the bet?	1	0	9	_____
() j) Your ability to hit the stop button at the right place if the stop button feature is available?	1	0	9	_____
() k) The skill of the player?	1	0	9	_____

29. On average, how much money do you put into a machine each time you start to play?

30. On average, how much money would you bring to a location to spend at one time on VL play?

31. On average, how often would you spend all the money you brought to play with?
(READ LIST)

- Never (0%) 0 - GO TO Q # 32e
- Rarely (<25%) 1 - CONTINUE
- Occasionally (25% to 50%) 2 - CONTINUE _____
- Frequently (50% +) 3 - CONTINUE
- Almost all the time (≈100%) 4 - CONTINUE

32a. How often would you get more money in order to continue to play on that day? **(READ LIST)**

- Never (0%) 0 - GO TO Q # 32e
- Rarely (<25%) 1 - CONTINUE
- Occasionally (25% to 50%) 2 - CONTINUE _____
- Frequently (50% +) 3 - CONTINUE
- Almost all the time (≈100%) 4 - CONTINUE

32b. Do you sometimes use your bank or cash card to get more money to continue playing that day?

- YES 1 - CONTINUE
- NO 0 - GO TO Q # 32d _____

32c. **IF YES:** Do you have to leave the location where you are playing or can you use your bank card at the location?

- Leave premises 1
- Use card on location 2 _____
- Both 3

32d. How often do you borrow money from other people where you are playing in order to continue play? **(READ LIST)**

- Never (0%) 0
- Rarely (<25%) 1
- Occasionally (25% to 50%) 2 _____
- Frequently (50% +) 3
- Almost all the time (≈100%) 4

☞ 32e. How often do you lend money to others so that they can continue to play? **(READ LIST)**

- Never (0%) 0
- Rarely (<25%) 1
- Occasionally (25% to 50%) 2 _____
- Frequently (50% +) 3
- Almost all the time (≈100%) 4

33a. Do any of the locations where you play offer you credit so you can continue to play VL games?

- YES 1 - **CONTINUE**
- NO 0 - **GO TO Q # 33c** _____
- Don't know/Unsure 9 - **GO TO Q # 33c**

33b. **IF YES:** How often have you used this service? **(READ LIST)**

- Never (0%) 0
- Rarely (<25%) 1
- Occasionally (25% to 50%) 2 _____
- Frequently (50% +) 3
- Almost every time (≈100%) 4

☞ 33c. Do any of the locations where you play allow you to cash a cheque so you can continue to play VL games?

- YES 1 - **CONTINUE**
- NO 0 - **GO TO Q # 34a** _____
- Don't know/Unsure 9 - **GO TO Q # 34a**

33d. **IF YES:** How often have you used this service? **(READ LIST)**

- Never (0%) 0
- Rarely (<25%) 1
- Occasionally (25% to 50%) 2 _____
- Frequently (50% +) 3
- Almost every time (≈100%) 4

35. Out of ten times you might play VL games, how often are you up any amount of money when you are done playing?

_____ %

36a. After losing money playing VL games, have you ever gone back later that day or on another day in order to win your money back?

YES - in last 3 months	4	
YES - in last 6 months	3	
YES - in last 12 months	2	_____
YES - more than 1 year ago	1	
NO	0	

36b. After losing money on other gambling activities, have you tried to win your money back by playing VL games?

YES - in last 3 months	4	
YES - in last 6 months	3	
YES - in last 12 months	2	_____
YES - more than 1 year ago	1	
NO	0	

37a. When you are playing VL games, how often do you drink alcoholic beverages? (**READ LIST**)

Never (0%)	0 - CONTINUE	
Rarely (<25%)	1 - GO TO Q # 37c	
Occasionally (25% to 50%)	2 - GO TO Q # 37c	
Frequently (50% +)	3 - GO TO Q # 37c	_____
Almost Always (≈100%)	4 - GO TO Q # 37c	
Don't Know	9 - GO TO Q # 37c	

37b. Is there a specific reason why you don't drink when you play? (**Specify**)

GO TO Q # 38a

37c. Would you say you drink less, the same or more alcoholic beverages than you would if you were not playing VL games?

- Less 1 _____
- Same 2 _____
- More 3 _____
- Don't Know 9 _____

37d. When you are losing do you drink less, the same, or more compared to when you are winning?

- Less 1 _____
- Same 2 _____
- More 3 _____
- Don't Know 9 _____


37e. Do you ever play when you would consider yourself to have had too much to drink?

- YES 1 _____
- NO 0 _____

37f. In your opinion, does the amount you drink affect how you play the games?

- YES 1 - CONTINUE _____
- NO 0 - GO TO Q # 38a _____

37g. **IF YES:** How does it affect your play?

 38a. Which of the following best describes your smoking habits? **(READ LIST)**

- Non-Smoker 0 - GO TO Q # 39 _____
- Social Smoker 1 - CONTINUE _____
- Regular Smoker 2 - CONTINUE _____

38b. Do you normally smoke when you play VL games?

YES 1 - CONTINUE
 NO 0 - GO TO Q # 39

38c. Do you tend to smoke less, the same or more than you would if you were not playing VL games? _____

Less 1
 Same 2
 More 3

39. When you are playing a VL machine, do you ever do other things such as play pool or darts at the same time?

YES 1
 NO 0

40a. Do you ever jam the machine on so that it plays automatically? _____

YES 1 - CONTINUE
 NO 0 - GO TO Q # 41a

40b. Would that be...

Rarely (<25%) 1
 Occasionally (25% to 50%) 2
 Frequently (50% +) 3
 Always (≈100%) 4

41a. Is there anything you do while playing the games to try and improve your chances of winning?

YES 1 - CONTINUE
 NO 0 - GO TO Q # 42a

41b. What is it you do to improve your chances of winning?

41c. How important is it for you to use this system or strategy when you play? (READ LIST)

Not at all important 0

Somewhat important	1	_____
Very important	2	_____

☞ 42a. Do you have any superstitions or rituals you use when playing?

YES	1 - CONTINUE	_____
NO	0 - GO TO Q # 43	_____

42b. What are they?

_____	_____
_____	_____
_____	_____
_____	_____

☞ 43. Do you tend to sit or stand when playing video lottery games?

Sit	1	_____
Stand	2	_____
Don't Know	9	_____

PLAYER CULTURE

44a. Do you have a spouse or partner?

YES	1 - CONTINUE	_____
NO	0 - GO TO Q # 45	_____

44b. How often do you talk to your spouse or partner about your play of VL games? (**READ LIST**)

Never	0	_____
Rarely	1	_____
Occasionally	2	_____
Frequently	3	_____

☞ 45. How often do you talk about your play of VL games with friends or acquaintances? (**READ LIST**)

Never	0
Rarely	1

Occasionally	2	_____
Frequently	3	_____

46. How often do you feel uncomfortable because other people are watching you play?


Never (0%)	0	
Rarely (<25%)	1	
Occasionally (25% to 50%)	2	_____
Frequently (50% +)	3	
Almost Always (≈100%)	4	

47a. Have you ever lost track of time while playing video lottery games?

YES	1 - CONTINUE	
NO	0 - GO TO Q # 48a	_____

47b. In the last three months, how often did that happen? (READ LIST)

Never (0%)	0	
Rarely (<25%)	1	
Occasionally (25% to 50%)	2	_____
Frequently (50% +)	3	
Almost Always (≈100%)	4	


 48a. Have you ever missed or were late for a significant family or personal event because you were playing the machines?

YES - Missed	1 - CONTINUE	
YES - Were Late	2 - CONTINUE	
YES - Both	3 - CONTINUE	_____
NO	0 - GO TO Q # 49a	

48b. In the last three months, how often has this happened? (READ LIST)

Never (0%)	0	
Rarely (<25%)	1	
Occasionally (25% to 50%)	2	_____
Frequently (50% +)	3	
Almost Always (≈100%)	4	

EMOTIONAL RESPONSE

 49a. How often do you have any of the following physical responses when you are playing VL games, using a scale of Never (0%), Rarely (<25%), Occasionally (25% to 50%), Frequently (50% +) or Almost Always (≈100%)?

Almost

	Never	Rarely	Occasionally	Frequently	Always	
1) Butterflies in your stomach	0	1	2	3	4	_____
2) Dry eyes	0	1	2	3	4	_____
3) Heart racing/pounding	0	1	2	3	4	_____
4) Nausea/feeling sick to your stomach	0	1	2	3	4	_____
5) Headaches	0	1	2	3	4	_____
6) Sweaty hands/body	0	1	2	3	4	_____
7) Shakes/tremors/trembles	0	1	2	3	4	_____

49b. Using the same scale, how often do you have any of the following emotional responses when playing VL games?

	Never	Rarely	Occasionally	Frequently	Almost Always	
1) Excited/happy	0	1	2	3	4	_____
2) Nervous/edgy	0	1	2	3	4	_____
3) Angry/frustrated	0	1	2	3	4	_____
4) Sad/depressed	0	1	2	3	4	_____
5) Disappointed	0	1	2	3	4	_____

49c. Again, using the same scale, how often are you involved in any of the following behaviours when playing the machines?

	Never	Rarely	Occasionally	Frequently	Almost Always	
1) Swearing/cursing	0	1	2	3	4	_____
2) Cheering/yelling out loud	0	1	2	3	4	_____
3) Sighing/groaning	0	1	2	3	4	_____
4) Hitting/kicking machine	0	1	2	3	4	_____
5) Talking to the machine (encouraging/threatening)	0	1	2	3	4	_____

49d. Are there any other physical, emotional or behavioural responses you have when playing the machines?

50a. Now, referring to the last three months, how often have you played video lottery games with friends or acquaintances on the same machine? **(READ LIST)**

Never (0%)	0	
Rarely (<25%)	1	
Occasionally (25% to 50%)	2	_____
Frequently (50% +)	3	
Always (≈100%)	4	

50b. Again referring to the last three months, how often have you played video lottery games with friends or acquaintances who are on a nearby machine? **(READ LIST)**

Never (0%)	0	
Rarely (<25%)	1	
Occasionally (25% to 50%)	2	_____
Frequently (50% +)	3	
Always (≈100%)	4	

51. During the last three months, how often have you timed your arrival to get a machine when you go to a location to play VL games? **(READ LIST)**

- Never (0%) 0 _____
- Rarely (<25%) 1
- Occasionally (25% to 50%) 2
- Frequently (50% +) 3
- Always (≈100%) 4

52. Do you prefer to play a particular machine at the location where you play because you feel it is lucky?

- YES 1 _____
- NO 0

53. Again, during the last three months, how often did you play more than one machine at the same time? **(READ LIST)**

- Never (0%) 0 _____
- Rarely (<25%) 1
- Occasionally (25% to 50%) 2
- Frequently (50% +) 3
- Always (≈100%) 4

54a. How often do you have trouble stopping/quitting playing when you are ahead? **(READ LIST)**

- Never (0%) 0 _____
- Rarely (<25%) 1
- Occasionally (25% to 50%) 2
- Frequently (50% +) 3
- Almost Always (≈100%) 4

54b. How often do you feel you have to continue playing the games as long as there is money left? **(READ LIST)**

- Never (0%) 0 _____
- Rarely (<25%) 1
- Occasionally (25% to 50%) 2
- Frequently (50% +) 3
- Almost Always (≈100%) 4

54c. How often do you increase your bet level in order to win back money you have lost? **(READ LIST)**

- Never (0%) 0 _____
- Rarely (<25%) 1 _____
- Occasionally (25% to 50%) 2 _____
- Frequently (50% +) 3 _____
- Almost Always (≈100%) 4 _____

54d. How often do you exceed the amount of money you intended to spend in order to win back money you have lost? **(READ LIST)**

- Never (0%) 0 _____
- Rarely (<25%) 1 _____
- Occasionally (25% to 50%) 2 _____
- Frequently (50% +) 3 _____
- Almost Always (≈100%) 4 _____

PROBLEM & CONTROL MECHANISMS

55a. Has anyone ever told you they were concerned with how much time or money you were spending on VL gaming?

- YES 1 _____
- NO 0 _____

55b. Have you ever felt you were spending more money or time playing VL games than you should?

- YES - More Money 1 - CONTINUE
- YES - More Time 2 - CONTINUE
- YES - Both 3 - CONTINUE _____
- NO 0 - GO TO Q # 57a

55c. Have you dealt with this issue of your VL gaming or is it still a concern to you? **(READ LIST)**

- Resolved Problem Completely 1 - CONTINUE
- Resolved Problem Partially 2 - CONTINUE
- Still a Problem 3 - GO TO Q # 56a _____

55d. How long ago did you resolve this issue? **(CONVERT TO MONTHS)**

Years: _____

OR

Months: _____

55e. How did you get your VL spending/play under control?

55f. Are there any ways that you tried to control your spending or play that were unsuccessful in the long run?

GO TO Q # 57a

56a. How long have you felt this way about your VL play? (**CONVERT TO MONTHS**)

Years: _____

OR

Months: _____

56b. Have you ever attempted to control the amount of time or money you spend playing these games?

YES

1 - CONTINUE

NO

0 - GO TO Q # 57a

56c. Approximately how many times have you gone through periods when you made a concerted effort to control your VL play, either alone or with the help of someone else?

56d. What, if any, ways have you personally tried to control your spending/play that were relatively successful in the long run?

56e. What, if any, ways have you tried to control your spending that were relatively unsuccessful in the long run?

57. a) Have you ever gone to any of the following sources for help or information on controlling your VL play? (**READ LIST - PROBE FOR WHO - RECORD BELOW**)
- b) Without your request, have any of these sources volunteered or tried to provide you with information and/or help on controlling your VL play?
- c) Have you ever sought any information or help from any of these sources to help someone else control their VL play?
- d) **FOR ALL MENTIONS:** On a scale of 1 to 5 where 1 means not at all helpful and 5 means extremely helpful, how helpful was the assistance you received from _____ ?

	a) Help for Self	b) Help from Others	c) Help for Someone Else	d) Rating
Spouse/Partner	1 _____	1 _____	1 _____	_____
Other Family Members, Household	2 _____	2 _____	2 _____	_____
Employer/Colleagues	3 _____	3 _____	3 _____	_____
Friends	4 _____	4 _____	4 _____	_____
Church/Religious Groups	5 _____	5 _____	5 _____	_____
Family Doctor, Therapist	6 _____	6 _____	6 _____	_____
Gambling Self-Help Group/Gamblers Anonymous	7 _____	7 _____	7 _____	_____
Drug Dependency Services/Detox	8 _____	8 _____	8 _____	_____
Gambling Helpline	9 _____	9 _____	9 _____	_____
Community Center/Counselor	10 _____	10 _____	10 _____	_____
Other _____	11 _____	11 _____	11 _____	_____
(None of the Above/No One)	12 _____	12 _____	12 _____	_____

57e. **IF ANY HELP FOR SELF (54a) OR HELP FROM OTHERS (57b) MENTIONED:**
 What ways, if any, have others tried to help you that were successful in the long run?

57f. **IF ANY HELP FOR SELF (54a) OR HELP FROM OTHERS (57b) MENTIONED:**
 What ways, if any, have others tried to help you that were relatively unsuccessful in the long run?

58. If brochures or flyers explaining methods of controlling your video lottery expenditures were available at locations where you play, would this be helpful for you personally or not?

YES	1	
NO	0	
Don't Know	9	_____

LIFESTYLE QUESTIONS

59. Do you have (close) friends who play video lottery games regularly?

YES	1	
NO	0	_____

60. Do other members of your family or close relatives (household) play video lottery games regularly?

YES	1	
NO	0	_____

61. Do you work or attend school outside the home?

YES - Work	1 - CONTINUE	
YES - School	2 - CONTINUE	
YES - Both	3 - CONTINUE	
NO	0 - GO TO Q # 62g	_____

62a. Are there any VL machines where you work or go to school, either on the premises or located nearby?

On premises	1	
Located nearby	2	
Both	3	_____
Neither	4	
Don't Know	9	

62b. In the last three months, have you ever played video lottery games during working or school hours?

YES	1 - CONTINUE	
NO	0 - GO TO Q # 62d	_____

62c. Did you play...

	YES	NO	D/K	
On breaks/between classes	1	0	9	_____
Lunch time	1	0	9	_____
OR Other times	1	0	9	_____

62d. Do you have any co-workers or fellow students who play video lottery games on a regular basis?


YES	1	
NO	0	
Don't Know	9	_____

62e. Do you travel for business purposes?

YES	1 - CONTINUE	
NO	0 - GO TO Q # 62g	_____

62f. **IF YES:** Do you play VL games when you are traveling for business purposes?

YES	1	
NO	0	_____

 62g. Have you ever missed or were late for work or school as a result of playing the games?

YES - Missed	1 - CONTINUE	
YES - Were Late	2 - CONTINUE	
YES - Both	3 - CONTINUE	_____
NO	0 - GO TO Q # 63	

62h. In the last three months, how often has this happened? **(READ LIST)**

Never (0%)	0	
Rarely (<25%)	1	
Occasionally (25% to 50%)	2	_____
Frequently (50% +)	3	
Almost Always (≈100%)	4	

63. Now, we are going to ask you how you spend your time in an average week. For each of the following activities, please indicate approximately how much time you spend on that activity in an average week. **(PROBE: We realize that it is difficult to be exact so please just give us your best guess as to how many hours or minutes you spend on each activity in an average week.)**

	hours : minutes
1) Watching TV (not including video tapes)	_____ : _____
2) Relaxing at home (playing music, reading, gardening, etc.)	_____ : _____
3) Involved with hobbies/crafts/special interest (e.g., woodworking, playing a musical instrument, sewing, tole painting)	_____ : _____
4) Socializing with friends/family at <u>your</u> home	_____ : _____
5) Socializing with friends/family at <u>their</u> homes	_____ : _____
6) Socializing with friends/family at bars	_____ : _____
7) Socializing with others by playing sports, involvement in volunteer organizations or other recreational activities	_____ : _____
8) Playing video lottery games/machines	_____ : _____
9) Playing games <u>not</u> for money (cards, video games, computer games, board games)	_____ : _____
10) Playing games to win money (excluding VL games)	_____ : _____
11) Working at your job (at work)	_____ : _____
12) (IF IN THE WORKFORCE) Working at your job (at home)	_____ : _____
13) Doing household chores	_____ : _____

64. Could you please tell me approximately how many times you participate in each of the following activities in an average month?

	# of times/month
1) Go out to visit family	_____
2) Go out to visit friends	_____
3) Go to Church/Synagogue	_____
4) Rent or watch video tapes	_____
5) Go out to movies	_____
6) Eat out at restaurants (not during work hours)	_____
7) Travel for business/pleasure (days of travel)	_____
8) Attend live sports events	_____
9) Attend live entertainment (concerts, theatre)	_____
10) Go to the library, museum, zoo or other types of historic, educational or entertainment sites	_____
11) Are involved in community clubs or organizations (such as Scouts, Guides, Kiwanis, Lions, Community Groups)	_____
12) Are involved in other volunteer work	_____

65. Excluding video lottery games and other games of chance played for money, approximately how much money do you spend each month on entertainment activities?

66. On average, how often would you say you go to a bar, club, pub or lounge?

More than once a week	5	
Once a week	4	
Every two weeks	3	_____
About once a month	2	
Less than once a month	1	
Do not go	0	

67. In general, on a scale of 1 to 10 where 1 means your VL play is not at all a problem and 10 means your VL play is a serious problem, how would you rate your VL play right now?

Not at all a problem		Serious problem
1	2	3
4	5	6
7	8	9
	10	_____

Demographics

68. In what year were you born?

Specify: _____

69a. Including yourself, how many people live in your household?

(IF ONE - GO TO Q # 70)

69b. Are there any other adults in your household, 19 years of age or older, who play video lottery games either... **(SPECIFY HOW MANY)**

Occasionally _____

once every few months or so _____

OR

On a regular basis _____

of once a month or more _____

(TOTAL CANNOT EQUAL MORE THAN Q # 69a)

69c. How many children in your household are under 19 years of age?

70. What is your current marital status? **(READ LIST)**

Single	1	
Married/Cohabiting/Living with a partner	2	_____
Divorced/Widow/Separated	3	

71. Which of the following best describes your current work status?

Working Full-time	1 - CONTINUE	
Working Part-time	2 - CONTINUE	
Unemployed	3 - GO TO Q # 73	_____
Student	4 - GO TO Q # 73	
Homemaker	5 - GO TO Q # 73	
Retired	6 - GO TO Q # 73	
Disabled	7 - GO TO Q # 73	

72. What is your current occupation (i.e. the type of work you do)?

73. Which of the following best describes the highest level of education you have completed?

- Less than Grade 9 1
- Grade 9 - 13 2
- Trade School/Non-University 3
- University without degree 4
- University with degree 5
- University post-graduate degree 6
- Refused 7

74a. Which of the following broad income categories best describes your total annual household income (that is, everyone combined, before taxes)?

- Less than \$10,000 1
- \$10,000 - \$25,000 2
- \$25,001 - \$35,000 3
- \$35,001 - \$45,000 4
- \$45,001 - \$60,000 5
- \$60,001 - \$75,000 6
- Over \$75,000 7
- Refused 8 - GO TO Q # 75
- Don't Know 9 - GO TO Q # 75

74b. How many individuals contributed to this income?

75. What language is your mother tongue?

- English 1
- French 2
- English/French 3
- Other _____ 4

76. What are the first three digits of your postal code?

77. **INTERVIEWER ONLY:**

- Male 1
- Female 2

CLOSING STATEMENT

This completes your participation in our study, however, we would like to ask if you are interested in being part of an ongoing confidential research panel. You may be contacted in order to get your opinions on various issues or concepts concerning video lottery gaming. This would give you an opportunity to have direct input on something which affects you and/or someone you know. Your participation is voluntary and completely confidential. As members of the Professional Marketing Research Society and the Better Business Bureau, we guarantee that any information you provide will be used for research purposes only. Is this something you could help us with?

YES 1
NO 2

IF YES: May I ask for your first name to keep in our panel?

You may receive a quality control check. My supervisor calls back 10% to 15% of all my completed surveys to ensure you were comfortable participating in our study and that I was doing my job properly. May I please confirm your telephone number? **IF "NO" TO PANEL:** May I ask your first name so my supervisor would know who to ask for?

TELEPHONE #: _____ DATE: _____

INTERVIEWER: _____ SUPERVISOR: _____

DATA ENTRY: _____ QCC: _____

On behalf of Focal Research, I would like to thank you for your participation. Your contribution to our research is greatly appreciated.

APPENDIX C

**Provincial Overview
Data Tables**

HOW TO READ THE DATA TABLES

The data tables in this Appendix present combined results of the Nova Scotia General Population Survey and the Nova Scotia VL Players' Survey. The data was combined and segmented into three VL Player population segments: Non-VLT Players (n=246; NS adults who have never played video lottery games), Casual VLT Players (n=131; NS adults who have tried video lottery games at some time in the past but do not play on a regular, monthly basis), and Regular VLT Players (n=711; those who currently play video lottery games on a regular, continuous basis -- once per month or more over the past three months). The data was weighted by the incidence of each VL population segment in the Nova Scotian adult population (age 19 years or older) prior to analysis.

MARKET PROFILE:

Unless otherwise specified, the results presented in each table comprise a *profile* of response within each segment. In this case, the figures identify the percentage within each VL population segment exhibiting each particular response or characteristic. This allows users to determine what a particular segment "looks like" in terms of the measures included in the survey. Percentages within each category of responses will total approximately 100% (i.e., 100% ± 1% - 99% to 101% due to rounding).

For market profile figures, tests of significance are conducted among the VL population segments (i.e., horizontal comparisons). These tests indicate whether or not adults within each VL population segment are more (or less) likely to fall into a particular response category as compared to adults in the other VL population segments. (*Note: Tests of significance are also conducted among average values for each segment.*) Differences significant at the 90% confidence level or higher are shaded (i.e., the difference in response among the three VL population segments will be found nine out of ten times the population is sampled). ***NOTE: In some cases, two proportions (or averages) may have a relatively large absolute difference between them, but may not be shaded. It may be that the proportions are different at only the 80% or 85% confidence level, or the figures have smaller sample sizes, meaning larger margins of error and higher variance, therefore, less confidence in an actual difference which would be repeated with study replication. Refer to Section 1.8 for a detailed discussion of tests of significance, confidence intervals and margins of error.***

Example of market profile figures:

Demographic Profile of VL Population Segments

	Total Population (n=1088)	Non-VLT Players (n=246)	Casual VLT Players (n=131)	Regular VLT Players (n=711)
Percent of Population:	100%	61.5%	32.8%	5.7%
Gender:				
Male	48%	41%	58%	62%
Female	52%	59%	42%	38%

 - indicates differences among segments significant at the 90%+ confidence level.

The first row in the above example (Percent of Population) shows the percentage of the NS adult population falling into each VL population segment.

The results show that 48% of the NS adult population is male with the remaining 52% female (Total Population column). Males comprise 41% of all Non-VLT Players, while 59% of Non-VLT Players are female. The shading indicates significant differences in terms of gender among the three population segments. Non-VLT Players are significantly *less likely* to be male (41%) than both Casual VLT Players (58%) and Regular VLT Players (62%). Conversely, Non-VLT Players are significantly *more likely* to be female (59%) as compared to Casual (42%) and Regular VLT Players (38%). There is no statistically significant difference between the likelihood of Casual and Regular VLT Players being male or female.

MARKET PENETRATION:

Market penetration figures are also included for select data tables (i.e., market penetration by demographic category). These figures represent the percentage of NS adults within each response category who fall into each of the VL population segments. This allows users to identify groups of adults with a particular characteristic (i.e., those in a particular demographic category) who are more (or less) likely to fall into each of the VL population segments. Percentages across the three VL population segments will total approximately 100% (i.e., 100% ± 1% -- 99% to 101% due to rounding).

For market penetration figures, tests of significance are conducted within each VL population segment (i.e., vertical comparisons). Differences significant at the 90% confidence level or higher are shaded (i.e., the difference in response will be found nine out of ten times the population is sampled). **NOTE: In some cases, two proportions may have a relatively large absolute difference between them, but may not be shaded. It may be that the proportions are different at only the 80% or 85% confidence level, or the figures have smaller sample sizes, meaning larger margins of error and higher variance, therefore, less confidence in an actual difference which would be repeated with study replication. Refer to Section 1.8 for a detailed discussion of tests of significance, confidence intervals and margins of error.**

Example of market penetration figures:

Market Penetration Of VL Play By Demographic Category

	Total Population (n=1088)	Non-VLT Players	Casual VLT Players	Regular VLT Players	Total
Percent of Population:	100%	61.5%	32.8%	5.7%	100%
Gender:					
Male	48%	53%	40%	7%	100%
Female	52%	69%	26%	4%	100%

 - indicates differences within segments significant at the 90%+ confidence level.


The first row in the above example (Percent of Population) shows the percentage of the NS adult population falling into each VL population segment.

The results show that 48% of the NS adult population is male with the remaining 52% female (Total Population column). The rows may be read across, as 53% of all male adults in NS are Non-VLT Players; 40% of males are Casual VLT Players and the remaining 7% of male adults in the province are Regular VLT Players. The shading indicates significant differences in terms of penetration of each VL population segment for the gender categories. Females (69%) are significantly *more likely* to be Non-VLT Players than males (53%), and are significantly *less inclined* to be Casual (26% versus 40%) or Regular VLT Players (4% versus 7%).

GENERAL POPULATION SURVEY - DATA TABLES BY VLT POPULATION SEGMENT
GAMBLING ACTIVITIES PROFILE

	Non-VLT Players (n=246)	Casual VLT Players (n=131)	Regular VLT Players (n=711)	Total Population (n=1088)
Percent of Population:	61.5%	32.8%	5.7%	100%
TRIAL/PLAY OF GAMBLING ACTIVITIES:				
Play of Any Type Of Gaming (including VLT's):				
Ever played	90%	100%	100%	94%
Regular play	46%	62%	100%	54%
Play in last month	76%	85%	100%	80%
Average number of gaming options played on a monthly basis:	0.8	1.0	3.1	1.0
Average number of gaming options played in the last month:	1.6	2.2	4.1	2.0
Total average monthly gaming expenditure:	\$21.61	\$30.92	\$318.64	\$41.70
Video Lottery Games:				
Ever played	----	100%	100%	33%
Regular play	----	----	100%	6%
Play in last month	----	16%	100%	11%
Average monthly expenditure	----	\$1.29	\$243.52	\$14.39
Lottery Draws:				
Ever played	78%	82%	91%	80%
Regular play	37%	44%	61%	41%
Play in last month	54%	63%	79%	59%
Average amount spent last month	\$5.80	\$8.76	\$13.32	\$7.41
\$1.00 Scratch 'n Wins:				
Ever played	33%	50%	74%	41%
Regular play	6%	14%	33%	10%
Play in last month	20%	27%	50%	24%
Average amount spent last month	\$0.91	\$1.98	\$5.10	\$1.50
\$2.00 Scratch 'n Wins:				
Ever played	31%	48%	74%	39%
Regular play	7%	12%	36%	10%
Play in last month	20%	28%	55%	25%
Average amount spent last month	\$1.14	\$2.88	\$6.14	\$2.01
Breakopens/Pull-Tab Tickets (50¢):				
Ever played	13%	27%	43%	19%
Regular play	2%	7%	14%	5%
Play in last month	6%	11%	22%	9%
Average amount spent last month	\$0.20	\$0.45	\$2.60	\$0.42
Charity Raffles/Draws:				
Ever played	65%	66%	66%	65%
Regular play	13%	14%	13%	13%
Play in last month	43%	43%	30%	42%
Average amount spent last month	\$4.54	\$4.86	\$3.76	\$4.60

Bingo For Money (Excluding Lotto Bingo):				
Ever played	9%	18%	32%	14%
Regular play	4%	5%	13%	4%
Play in last month	6%	8%	15%	7%
Average amount spent last month	\$2.58	\$4.42	\$12.52	\$3.75


 - indicates differences among segments significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).

GAMBLING ACTIVITIES PROFILE - Continued

	Non-VLT Players (n=246)	Casual VLT Players (n=131)	Regular VLT Players (n=711)	Total Population (n=1088)
Percent of Population:	61.5%	32.8%	5.7%	100%
TRIAL/PLAY OF GAMBLING ACTIVITIES - Continued:				
Horse Races:				
Ever played	2%	4%	7%	3%
Regular play	----	----	2%	<1%
Play in last month	1%	----	2%	1%
Average amount spent last month	\$0.47	\$0	\$2.60	\$0.44
Sport Select Proline - Sports Lottery:				
Ever played	3%	5%	15%	4%
Regular play	1%	2%	7%	1%
Play in last month	1%	2%	9%	2%
Average amount spent last month	\$0.07	\$0.05	\$1.93	\$0.17
Other Sports Bets/Pool:				
Ever played	4%	8%	16%	6%
Regular play	<1%	2%	6%	1%
Play in last month	1%	4%	8%	2%
Average amount spent last month	\$0.28	\$0.33	\$1.39	\$0.36
Cards/Card Games For Money Outside Of A Casino:				
Ever played	9%	18%	31%	13%
Regular play	3%	1%	9%	3%
Play in last month	5%	5%	13%	5%
Average amount spent last month	\$0.70	\$2.18	\$5.08	\$1.43
Slot Machines At A Casino:				
Ever played	22%	31%	57%	27%
Regular play	2%	1%	7%	2%
Play in last month	4%	9%	18%	7%
Average amount spent last month	\$4.11	\$1.96	\$11.17	\$3.18
Any Other Games At Casino Excluding Slot Machines (e.g., Roulette, Blackjack, etc.):				
Ever played	4%	14%	26%	9%
Regular play	<1%	1%	4%	1%
Play in last month	2%	3%	7%	3%
Average amount spent last month	\$0.75	\$1.60	\$5.97	\$1.33
Any Other Types Of Betting/Gambling Excluding VLT's (e.g., Dog Races, Off-Track Betting):				
Ever played	<1%	1%	2%	1%
Regular play	----	----	<1%	<1%
Play in last month	----	1%	1%	<1%
Average amount spent last month	\$0	\$0.15	\$0.37	\$0.07
Average number of gaming options played on a regular monthly basis (excluding VLT's):	0.8	1.0	2.1	0.9
Average number of gaming options played on a regular monthly basis	0.8	1.0	3.1	1.0


(including VLT's):				
Average number of gaming options played in the last month (excluding VLT's):	1.6	2.0	3.1	1.9
Average number of gaming options played in the last month (including VLT's):	1.6	2.2	4.1	2.0
Total average monthly gaming expenditure (excluding VLT's):	\$21.61	\$29.63	\$75.12	\$27.31
Total average monthly gaming expenditure (including VLT's):	\$21.61	\$30.92	\$318.64	\$41.70

 - indicates differences among segments significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).

LIKING OF VLT'S, EXPOSURE TO VLT'S, BAR PATRONAGE & SMOKING HABITS

	Non-VLT Players (n=246)	Casual VLT Players (n=131)	Regular VLT Players (n=711)	Total Population (n=1088)
Percent of Population:	61.5%	32.8%	5.7%	100%
RELATIVE LIKING OF VLT'S:				
Like <u>more</u> than other games of chance	N/A	9%	26%	5%
5				
4	N/A	4%	17%	2%
3	N/A	13%	31%	6%
2	N/A	13%	13%	5%
Like <u>less</u> than other games of chance	N/A	61%	13%	21%
Summary:				
Like more than other games of chance	N/A	13%	43%	7%
Neutral	N/A	13%	31%	6%
Like less than other games of chance	N/A	74%	26%	26%
EXPOSURE TO VLT'S/OTHERS WHO PLAY:				
Average number of times in a video lottery location during the last month:	2.2	4.4	10.8	3.4
Percent who have close friends who play video lottery games regularly:	33%	42%	73%	38%
Percent who have family or close relatives (household) who play VL games regularly:	15%	16%	39%	16%
Percent who have co-workers or fellow students who play lottery games on a regular basis:	12%	20%	32%	16%
PROXIMITY OF VLT'S TO WORK/SCHOOL:				
Total percent who work outside the home:	54%	80%	75%	64%
Total percent who attend school outside the home:	4%	10%	9%	6%
Percent who both work <u>and</u> attend school outside the home:	1%	7%	5%	3%
VL machines are located on the premises:	1%	3%	6%	2%
VL machines are located near work/school:	7%	14%	15%	10%
Percent who travel for business purposes:	23%	29%	20%	25%
FREQUENCY OF GOING TO A BAR, CLUB OR LOUNGE:				
Once a month or more	20%	40%	88%	30%
Less than once a month	21%	36%	7%	25%
Do not go	59%	24%	5%	45%
SMOKING HABITS:				
Regular Smoker	23%	34%	57%	29%
Social Smoker	4%	8%	8%	6%
Non-Smoker	73%	58%	35%	66%

 - indicates differences among segments significant at the 90%+


NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to

_____ *confidence level.*

101%).

WEEKLY SOCIAL & RECREATIONAL ACTIVITY

	Non-VLT Players (n=246)	Casual VLT Players (n=131)	Regular VLT Players (n=711)	Total Population (n=1088)
Percent of Population:	61.5%	32.8%	5.7%	100%
TIME SPENT WEEKLY ON SOCIAL AND RECREATIONAL ACTIVITIES:				
% who watch TV (not including video tape)	98%	100%	100%	99%
Median minutes per week	600	840	900	720
% who relax at home (playing music, gardening)	91%	94%	95%	92%
Median minutes per week	600	600	600	600
% involved with hobbies/crafts/special interests	50%	63%	58%	55%
Median minutes per week	15	240	120	120
% who socialize with friends/family at home	85%	90%	88%	87%
Median minutes per week	240	240	240	240
% who socialize with friends/family at their home	80%	88%	87%	83%
Median minutes per week	120	180	240	180
% who socialize with friends or family at bars	14%	31%	69%	22%
Median minutes per week	0	0	120	0
% who socialize with others by playing sports, involvement with volunteer organizations etc.	49%	53%	57%	51%
Median minutes per week	0	60	120	60
% who play video lottery games	----	9%	89%	8%
Median minutes per week	0	0	60	0
% who play games <u>not</u> for money	47%	60%	66%	52%
Median minutes per week	0	60	60	30
% who play other games to win money	5%	16%	31%	10%
Median minutes per week	0	0	0	0
% who work at their job (at work)	55%	82%	74%	65%
Median minutes per week	1080	2400	2400	2100
% who work at home (if in the workforce)	24%	31%	13%	26%
Median minutes per week	0	0	0	0
% who do household chores	94%	95%	95%	95%
Median minutes per week	720	480	420	600

 - indicates differences among segments significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).

PARTICIPATION IN ACTIVITIES IN AN AVERAGE MONTH

	Non-VLT Players (n=246)	Casual VLT Players (n=131)	Regular VLT Players (n=711)	Total Population (n=1088)
Percent of Population:	61.5%	32.8%	5.7%	100%
Frequency of Participation in Activities in an Average Month:				
% who go out to visit family	86%	93%	87%	89%
Average times per month	6.2	7.6	6.3	6.7
% who go out to visit friends	89%	92%	91%	90%
Average times per month	4.6	5.7	6.8	5.1
% who go to church/synagogue	55%	34%	29%	46%
Average times per month	2.4	1.0	0.9	1.9
% who rent or watch video tapes	55%	79%	77%	64%
Average times per month	2.2	4.5	4.1	3.1
% who go out to movies	23%	36%	35%	28%
Average times per month	0.3	0.5	0.6	0.4
% who eat out at restaurants (not during work hours)	83%	87%	86%	84%
Average times per month	2.4	3.1	3.5	2.7
% who travel for business/pleasure (days of travel)	55%	60%	44%	56%
Average times per month	2.6	3.1	2.0	2.7
% who attend live sports events	24%	27%	38%	26%
Average times per month	0.9	0.8	1.2	0.9
% who attend live entertainment (concerts, theatre)	25%	26%	28%	26%
Average times per month	0.3	0.3	0.5	0.3
% who go to the library, museum, zoo or other types of historic, educational or entertainment sites	41%	44%	33%	42%
Average times per month	1.3	1.1	1.2	1.2
% who are involved in community clubs or organizations	31%	24%	21%	28%
Average times per month	1.3	0.8	0.9	1.1
% who are involved in other volunteer work	35%	24%	20%	31%
Average times per month	2.0	0.9	0.8	1.6
Average monthly entertainment expenditure:	\$60.26	\$120.48	\$117.33	\$83.31
Average monthly gaming and entertainment expenditure (excluding VLT's):	\$81.63	\$150.12	\$192.12	\$110.40
Average monthly gaming and entertainment expenditure (including VLT's):	\$81.63	\$151.40	\$435.64	\$124.79

- indicates differences among segments significant at the 90%+

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to


_____ *confidence level.*

101%.

EFFORTS TO CONTROL VL PLAY (SELF/OTHERS)

	Non-VLT Players (n=246)	Casual VLT Players (n=131)	Regular VLT Players (n=711)	Total Population (n=1088)
Percent of Population:	61.5%	32.8%	5.7%	100%
Percent who have been told that someone is concerned about how much time or money they were spending on video lottery games:	----	3%	18%	2%
Total percent who ever felt they were spending too much money on video lottery games:	----	8%	23%	4%
Total percent who ever felt they were spending too much time on video lottery games:	----	5%	19%	3%
Percent who ever felt they were spending too much time <u>and</u> money on video lottery games:	----	5%	17%	2%
Those Who Ever Sought Assistance Or Information In Order To Help Either Themselves Or Someone Else Control Their Video Lottery Play:				
Total percent who sought help for self	----	1%	6%	1%
Total percent who sought help for someone else	5%	8%	4%	6%
Percent who sought help for both for self <u>and</u> someone else	----	----	1%	<1%
Never sought help	95%	92%	91%	94%
SOURCES ACCESSED TO OBTAIN HELP OR INFORMATION ON CONTROLLING PLAY OF VIDEO LOTTERY GAMES...				
Total (i.e., accessed for self and/or someone else):				
Spouse/Partner	2%	2%	4%	2%
Other family members, household	2%	2%	2%	2%
Friends	1%	2%	4%	2%
Family doctor, therapist	2%	4%	2%	2%
Gambling self-help group/Gamblers Anonymous	1%	2%	1%	2%
Drug Dependency Services/Detox	1%	2%	1%	2%
Church/Religious groups	1%	3%	1%	2%
Employer/Colleagues	<1%	2%	1%	1%
Gambling helpline	1%	1%	1%	1%
Community center/Counselor	1%	1%	1%	1%
Other (See verbatim listing)	<1%	2%	<1%	1%
For Self:				
Spouse/Partner	----	1%	3%	<1%
Other family members, household	----	----	2%	<1%
Friends	----	----	2%	<1%
Family doctor, therapist	----	----	1%	<1%
Gambling self-help group/Gamblers	----	1%	1%	<1%


Anonymous				
Drug Dependency Services/Detox	----	----	1%	<1%
Church/Religious groups	----	----	<1%	<1%
Employer/Colleagues	----	----	1%	<1%
Gambling helpline	----	----	1%	<1%
Community center/Counselor	----	----	1%	<1%
Other (See verbatim listing)	----	----	<1%	<1%

 - indicates differences among segments significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).

EFFORTS TO CONTROL VL PLAY (SELF/OTHERS) - Continued

	Non-VLT Players (n=246)	Casual VLT Players (n=131)	Regular VLT Players (n=711)	Total Population (n=1088)
Percent of Population:	61.5%	32.8%	5.7%	100%
SOURCES ACCESSED TO OBTAIN HELP OR INFORMATION ON CONTROLLING PLAY OF VIDEO LOTTERY GAMES... - Continued				
For Someone Else:				
Spouse/Partner	2%	2%	1%	2%
Other family members, household	2%	2%	<1%	2%
Friends	1%	2%	2%	2%
Family doctor, therapist	1%	3%	<1%	2%
Gambling self-help group/Gamblers Anonymous	2%	3%	1%	2%
Drug Dependency Services/Detox	1%	2%	<1%	2%
Church/Religious groups	1%	----	----	1%
Employer/Colleagues	<1%	2%	<1%	1%
Gambling helpline	1%	1%	<1%	1%
Community center/Counselor	1%	1%	<1%	1%
Other (See verbatim listing)	<1%	2%	<1%	1%


 - indicates differences among segments significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).

EFFORTS TO CONTROL VL PLAY (SELF/OTHERS) - Continued

	Non-VLT Players (n=246)	Casual VLT Players (n=131)	Regular VLT Players (n=711)	Total Population (n=1088)
Percent of Population:	61.5%	32.8%	5.7%	100%
Rating of Helpfulness For...				
Spouse/Partner:				
Helpful	1%	1%	2%	1%
Neutral/Unsure	----	1%	1%	<1%
Not Helpful	<1%	1%	2%	1%
Other Family Members, Household:				
Helpful	1%	1%	1%	1%
Neutral/Unsure	<1%	----	1%	<1%
Not Helpful	<1%	1%	2%	1%
Employer/Colleagues:				
Helpful	<1%	1%	----	1%
Neutral/Unsure	----	1%	----	<1%
Not Helpful	----	----	1%	<1%
Friends:				
Helpful	1%	1%	2%	1%
Neutral/Unsure	----	2%	1%	1%
Not Helpful	<1%	----	1%	<1%
Church/Religious Groups:				
Helpful	1%	----	<1%	1%
Neutral/Unsure	----	----	----	----
Not Helpful	----	----	----	----
Family Doctor, Therapist:				
Helpful	<1%	2%	1%	1%
Neutral/Unsure	----	----	<1%	<1%
Not Helpful	<1%	1%	1%	1%
Gambling Self-Help Group/Gamblers Anonymous:				
Helpful	1%	4%	<1%	2%
Neutral/Unsure	----	----	1%	<1%
Not Helpful	<1%	----	1%	<1%
Drug Dependency Services/Detox:				
Helpful	1%	2%	1%	1%
Neutral/Unsure	----	----	<1%	<1%
Not Helpful	----	1%	<1%	<1%
Gambling Helpline:				
Helpful	1%	1%	1%	1%
Neutral/Unsure	<1%	----	<1%	<1%
Not Helpful	----	----	1%	<1%
Community Center/Counselor:				
Helpful	1%	1%	<1%	1%
Neutral/Unsure	----	----	<1%	<1%
Not Helpful	<1%	----	----	<1%

Other (See Verbatim Listing):				
Helpful	----	2%	<1%	1%
Neutral/Unsure	<1%	1%	----	1%
Not Helpful	----	----	<1%	<1%


 - indicates differences among segments significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).

DEMOGRAPHIC PROFILE OF VLT POPULATION SEGMENTS

	Total Population (n=1088)	Non-VLT Players (n=246)	Casual VLT Players (n=131)	Regular VLT Players (n=711)
Percent of Population:	100%	61.5%	32.8%	5.7%
Gender:				
Male	48%	41%	58%	62%
Female	52%	59%	42%	38%
Age Category:				
19 - 24	6%	2%	11%	19%
25 - 29	9%	6%	14%	14%
30 -34	13%	7%	24%	14%
35 - 39	17%	16%	18%	14%
40 - 44	10%	10%	11%	12%
45- 49	11%	12%	9%	9%
50 - 54	17%	22%	10%	13%
55+	17%	25%	3%	6%
Marital Status:				
Single/Never married	14%	10%	18%	32%
Married/Cohabiting	75%	75%	77%	57%
Divorced/Widowed/Separated	11%	15%	5%	11%
Number Of Adults In Household:				
One	17%	19%	15%	15%
Two	64%	64%	66%	55%
Three	13%	12%	14%	19%
Four or more	5%	5%	5%	11%
Average number of adults	2.1	2.0	2.1	2.3
Number Of Children In Household:				
No children	54%	62%	39%	59%
One or more children	46%	38%	61%	41%
Average number of children in household	0.9	0.8	1.1	0.7
Total People In Household:				
One	13%	15%	9%	11%
Two	34%	39%	24%	31%
Three	16%	11%	24%	23%
Four	24%	23%	27%	21%
Five	9%	9%	9%	11%
Six or more	5%	4%	7%	3%
Average number of people per household	3.0	2.8	3.2	3.0
Household Composition:				
One adult, no children	13%	15%	9%	10%
Two adults, no children	31%	37%	20%	28%
Three or more adults, no children	11%	11%	10%	20%
One adult with children	4%	4%	5%	4%
Two adults with children	41%	34%	56%	37%

Household VLT Play:				
Other Casual VLT Players in Household	11%	6%	19%	15%
Average Number Of Other Casual VLT Players	0.1	0.1	0.2	0.2
Other Regular VLT Players in Household	3%	2%	2%	27%
Average Number Of Other Regular VLT Players	0.04	0.02	0.02	0.30


 - indicates differences among segments significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).

DEMOGRAPHIC PROFILE OF VLT POPULATION SEGMENTS - Continued

	Total Population (n=1088)	Non-VLT Players (n=246)	Casual VLT Players (n=131)	Regular VLT Players (n=711)
Percent of Population:	100%	61.5%	32.8%	5.7%
Occupation Category:				
White collar	21%	19%	26%	14%
Grey collar	24%	22%	28%	24%
Blue collar	20%	15%	27%	35%
Income Supported	35%	44%	19%	27%
Work Status:				
Employed full-time	51%	42%	68%	60%
Employed part-time	14%	14%	13%	13%
Unemployed	4%	4%	4%	6%
Student	2%	1%	3%	5%
Homemaker	12%	14%	8%	6%
Retired	15%	23%	2%	7%
Disabled	3%	2%	3%	3%
Education Category:				
Less than grade 9	9%	10%	7%	6%
Grade 9 - 13	34%	34%	31%	45%
Trade school/Non-University	24%	20%	31%	26%
University without degree	14%	15%	12%	14%
University with degree	13%	14%	13%	8%
University post graduate degree	6%	6%	6%	1%
Summary:				
High school or less	43%	44%	38%	51%
Trade school/Vocational	24%	20%	31%	26%
University incomplete	14%	15%	12%	14%
University degree or more	19%	20%	19%	9%
Income Category:				
Less than \$10,000	4%	5%	2%	4%
\$10,000 - \$25,000	20%	22%	15%	19%
\$25,001 - \$35,000	20%	21%	20%	19%
\$35,001 - \$45,000	12%	11%	14%	18%
\$45,001 - \$60,000	15%	13%	20%	13%
\$60,001 - \$75,000	8%	6%	11%	5%
More than \$75,000	11%	11%	13%	8%
Refused	8%	10%	5%	4%
Don't know/Unsure	2%	1%	2%	10%
Summary:				
Low - less than \$25,000	24%	28%	17%	23%
Medium - \$25,000 - \$45,000	32%	31%	34%	37%
High - more than \$45,000	34%	30%	44%	26%
Refused/Don't know	10%	11%	6%	13%
Number Of People Contributing To				


Income:				
One	34%	36%	33%	30%
Two	60%	59%	61%	58%
Three or more	5%	5%	6%	12%
Average number of people contributing to income	1.7	1.7	1.7	1.9

 - indicates differences among segments significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).

DEMOGRAPHIC PROFILE OF VLT POPULATION SEGMENTS - Continued

	Total Population (n=1088)	Non-VLT Players (n=246)	Casual VLT Players (n=131)	Regular VLT Players (n=711)
Percent of Population:	100%	61.5%	32.8%	5.7%
Mother Tongue:				
English	92%	92%	92%	95%
French/Other	8%	8%	8%	5%
Area Of Residence:				
Urban	49%	47%	48%	63%
Rural	51%	53%	52%	37%


 - indicates differences among segments significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).

MARKET PENETRATION OF VL POPULATION SEGMENTS - BY DEMOGRAPHIC CATEGORY

	Total Population (n=1088)	Non-VLT Players	Casual VLT Players	Regular VLT Players	Total
Percent of Population:	100%	61.5%	32.8%	5.7%	100%
Gender:					
Male	48%	53%	40%	7%	100%
Female	52%	69%	26%	4%	100%
Age Category:					
19 - 24	6%	21%	62%	18%	100%
25 - 29	9%	40%	51%	9%	100%
30 -34	13%	31%	63%	6%	100%
35 - 39	17%	60%	35%	5%	100%
40 - 44	10%	60%	34%	6%	100%
45- 49	11%	67%	28%	5%	100%
50 - 54	17%	77%	19%	4%	100%
55+	17%	92%	6%	2%	100%
Marital Status:					
Single/Never married	14%	44%	42%	13%	100%
Married/Cohabiting	75%	62%	34%	4%	100%
Divorced/Widowed/Separated	11%	79%	15%	6%	100%
Number Of Adults In Household:					
One	17%	67%	28%	5%	100%
Two	64%	61%	34%	5%	100%
Three	13%	57%	34%	8%	100%
Four or more	5%	56%	32%	12%	100%
Number Of Children In Household:					
No children	54%	70%	23%	6%	100%
One or more children	46%	51%	44%	5%	100%
Total People In Household:					
One	13%	72%	23%	5%	100%
Two	34%	72%	23%	5%	100%
Three	16%	43%	49%	8%	100%
Four	24%	58%	37%	5%	100%
Five	9%	59%	34%	7%	100%
Six or more	5%	48%	48%	4%	100%
Household Composition:					
One adult, no children	13%	72%	23%	5%	100%
Two adults, no children	31%	74%	21%	5%	100%
Three or more adults, no children	11%	60%	30%	11%	100%
One adult with children	4%	53%	41%	6%	100%
Two adults with children	41%	50%	44%	5%	100%
Household VLT Play:					
Other Casual VLT Players in Household	11%	35%	58%	8%	100%

Other Regular VLT Players in Household	3%	38%	15%	47%	100%
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 - indicates differences among demographic categories (i.e., vertical comparisons) significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).


MARKET PENETRATION OF VL POPULATION SEGMENTS - BY DEMOGRAPHIC CATEGORY -
Continued

	Total Population (n=1088)	Non-VLT Players	Casual VLT Players	Regular VLT Players	Total
Percent of Population:	100%	61.5%	32.8%	5.7%	100%
Occupation Category:					
White collar	21%	55%	41%	4%	100%
Grey collar	24%	56%	38%	6%	100%
Blue collar	20%	47%	43%	10%	100%
Income Supported	35%	78%	18%	4%	100%
Work Status:					
Employed full-time	51%	50%	43%	7%	100%
Employed part-time	14%	64%	31%	6%	100%
Unemployed	4%	59%	33%	9%	100%
Student	2%	28%	55%	17%	100%
Homemaker	12%	76%	22%	3%	100%
Retired	15%	94%	3%	3%	100%
Disabled	3%	▲ 57%	▲ 38%	▲ 6%	100%
Education Category:					
Less than grade 9	9%	71%	25%	4%	100%
Grade 9 - 13	34%	62%	30%	8%	100%
Trade school/Non-University	24%	52%	42%	6%	100%
University without degree	14%	66%	29%	6%	100%
University with degree	13%	64%	32%	3%	100%
University post graduate degree	6%	66%	33%	1%	100%
Summary:					
High school or less	43%	64%	29%	7%	100%
Trade school/Vocational	24%	52%	42%	6%	100%
University incomplete	14%	66%	29%	6%	100%
University degree or more	19%	65%	32%	3%	100%
Income Category:					
Less than \$10,000	4%	81%	12%	6%	100%
\$10,000 - \$25,000	20%	69%	25%	5%	100%
\$25,001 - \$35,000	20%	63%	32%	5%	100%
\$35,001 - \$45,000	12%	54%	37%	9%	100%
\$45,001 - \$60,000	15%	53%	43%	5%	100%
\$60,001 - \$75,000	8%	51%	45%	4%	100%
More than \$75,000	11%	58%	38%	4%	100%
Refused	8%	78%	19%	3%	100%
Don't know/Unsure	2%	42%	28%	31%	100%
Summary:					
Low - less than \$25,000	24%	71%	23%	6%	100%
Medium - \$25,000 - \$45,000	32%	59%	34%	7%	100%
High - more than \$45,000	34%	54%	42%	4%	100%

Refused/Don't know	10%	71%	21%	8%	100%
Number Of People Contributing To Income:					
One	34%	63%	32%	5%	100%
Two	60%	60%	35%	5%	100%
Three or more	5%	53%	36%	11%	100%


 - indicates differences among demographic categories (i.e., vertical comparisons) significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).

 - due to small sample sizes ($10 < n < 30$), results should be viewed as exploratory.

**MARKET PENETRATION OF VL POPULATION SEGMENTS - BY DEMOGRAPHIC CATEGORY -
Continued**

	Total Populatio n (n=1088)	Non-VLT Players	Casual VLT Players	Regular VLT Players	Total
Percent of Population:	100%	61.5%	32.8%	5.7%	100%
Mother Tongue:					
English	92%	61%	33%	6%	100%
French/Other	8%	63%	33%	4%	100%
Area Of Residence:					
Urban	49%	60%	33%	8%	100%
Rural	51%	63%	33%	4%	100%

 - indicates differences among demographic categories (i.e., vertical comparisons) significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).

APPENDIX D

**Problem VL Gambler Analysis
Data Tables**

HOW TO READ THE DATA TABLES

The data tables in this Appendix present results for the Nova Scotia Video Lottery Players' Survey (i.e., Regular Video Lottery Players only, or Nova Scotian adults who play video lottery games on a regular, continuous basis -- once per month or more over the past three months). The data was segmented into three VL Player segments: Infrequent VL Players (n=327; Regular VL Players who play, on average, less than four times per month), Frequent VL Players (n=267; Regular VL Players who play four times per month or more often), and Problem VL Players (n=117; Regular VL Players who are categorized as having problems controlling the amount of time and/or money they spend playing VL games -- see Section 3.0 for details regarding Regular Player segmentation). The tables are organized to correspond with the sections in the report discussing each area; for example, Tables 3.1.1 through 3.1.3 present the results of the demographic analysis of Regular VL Players (by segment), as discussed in Section 3.1 of the report.

MARKET PROFILE:

Unless otherwise specified, the results presented in each table comprise a *profile* of response within each VL Player segment. In this case, the figures identify the percentage of players within each VL Player segment exhibiting each particular response or characteristic. This allows users to determine what a particular segment “looks like” in terms of the measures included in the survey. Percentages within each category of responses will total approximately 100% (i.e., 100% ± 1% -- 99% to 101% due to rounding).

For market profile figures, tests of significance are conducted among the VL Player segments (i.e., horizontal comparisons). These tests indicate whether or not players within each VL Player segment are more (or less) likely to fall into a particular response category as compared to players in the other segments. (*Note: Tests of significance are also conducted among average values for each segment.*) Differences significant at the 90% confidence level or higher are shaded (i.e., the difference in response among the three VL Player segments will be found nine out of ten times the population of Regular VL Players is sampled). ***NOTE: In some cases, two proportions (or averages) may have a relatively large absolute difference between them, but may not be shaded. It may be that the proportions are different at only the 80% or 85% confidence level, or the figures have smaller sample sizes, meaning larger margins of error and higher variance, therefore, less confidence in an actual difference which would be repeated with study replication. Refer to Section 1.8 for a detailed discussion of tests of significance, confidence intervals and margins of error.***

Example of market profile figures:

TABLE 3.1.1
Demographic Profile of VL Player Segments

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Gender:					
Male	62%	58%	66%	65%	----
Female	38%	42%	34%	35%	----
Marital Status:					
Single/Never married	32%	30%	33%	32%	----
Married/Cohabiting	57%	58%	57%	53%	----
Divorced/Widowed/Separated	11%	11%	9%	15%	6%

 - indicates differences among segments significant at the 90%+ confidence level.

The first row in the above example (Percent of Regular VL Players) shows the percentage of Regular Video Lottery Players in Nova Scotia falling into each VL Player segment.

The results show that 62% of Regular VL Players in the province are male with the remaining 38% female (Total VLT Players column). Males comprise 58% of all Infrequent VL Players, while 42% of Infrequent VL Players are female. The shading indicates significant differences in terms of gender among the three VL Player segments. Infrequent Players are significantly *less likely* to be male (58%) than both Frequent Players (66%) and Problem VL Players (65%). Conversely, Infrequent Players are significantly *more likely* to be female (42%) as compared to Frequent (34%) and Problem VL Players (35%). There is no statistically significant difference between the likelihood of Frequent and Problem VL Players being male or female.

For the most part, the Problem Player Analysis focuses on differences in response between Frequent and Problem VL Players (given that one primary objective of the study is identifying differentiating characteristics for VL Players experiencing problems with their VL gambling). Therefore, for easy reference, the fifth column in the profile tables (last column on the right) shows the percentage difference between response for Frequent Players and Problem Players in those instances where there are statistically significant differences. For example, Problem VL Players (15%) are significantly more likely to be divorced/widowed/separated when compared to Frequent VL Players (9%), a difference of six percentage points.

 **MARKET PENETRATION:**

Market penetration figures are also included for select data tables (i.e., market penetration by demographic category). These figures represent the percentage of Regular VL Players in NS within each response category who fall into each of the VL Player segments. This allows users to identify groups of players with a particular characteristic (i.e., those in a particular demographic category) who are more (or less) likely to fall into each of the VL Player segments. Percentages across the three VL Player segments will total approximately 100% (i.e., 100% ± 1% -- 99% to 101% due to rounding).

For market penetration figures, tests of significance are conducted within each VL Player segment (i.e., vertical comparisons). Differences significant at the 90% confidence level or higher are shaded (i.e., the difference in response will be found nine out of ten times the population of Regular VL Players is sampled). **NOTE: In some cases, two proportions may have a relatively large absolute difference between them, but may not be shaded. It may be that the proportions are different at only the 80% or 85% confidence level, or the figures have smaller sample sizes, meaning larger margins of error and higher variance, therefore, less confidence in an actual difference which would be repeated with study replication. Refer to Section 1.8 for a detailed discussion of tests of significance, confidence intervals and margins of error.**

Example of market penetration figures:

TABLE 3.1.2
Market Penetration Of VL Player Segments By Demographic Category

	Total VLT Players	Infrequent Players	Frequent Players	Problem Players	Total
Percent Of Regular VL Players:	100%	46%	38%	16%	100%
Gender:					
Male	62%	43%	40%	17%	100%
Female	38%	51%	34%	15%	100%

 - indicates differences within segments significant at the 90%+ confidence level.

The first row in the above example (Percent of Regular VL Players) shows the percentage of Regular VL Players in Nova Scotia falling into each VL Player segment.

The results show that 62% of Regular VL Players in the province are male with the remaining 38% female (Total VLT Players column). The rows may be read across, as 43% of all Regular VL Players who are male being categorized as Infrequent VL Players; 40% of male Regular VL Players are Frequent Players; and the remaining 17% of male players in the province are Problem VL Players. The shading indicates significant differences in terms of penetration of each VL population segment for the gender categories. Female VL players are significantly *more likely* to be Infrequent Players (51%) than players who are male (43%), while there are no significant differences in the likelihood of male or female players being categorized as either Frequent or Problem VL Players.

 **RELATIVE INDEX VALUES:**

Relative index values are also included for select data tables (i.e., relative index values by demographic category). These indices compare the penetration of VL Player segments within each demographic category to Regular VL Players in the population. An index value greater than 1.0 indicates that the incidence of VL players in that particular segment is higher for that demographic category as compared to all Regular Players. Conversely, an index value less than 1.0 indicates that the demographic category of Regular VL Players has a lower incidence of the specific VL Player segment than is found in the total population of Regular Players. Tests of significance were conducted comparing each index value to overall penetration for all Regular Players. Arrows (↑ ↓) denote differences significant at the 90% confidence level or higher (i.e., the difference in response will be found nine out of ten times the population of Regular VL Players is sampled). It is noteworthy that, for practical purposes, relative index values are comparable both within the segment and across segments.

Example of relative index values:

TABLE 3.1.3
Relative Index Values For VL Player Segments - By Demographic Category

	Total VLT Players	Infrequent Players	Frequent Players	Problem Players
Percent Of Regular VL Players:	100%	46%	38%	16%
Gender:				
Male	62%	0.94	1.06	1.05
Female	38%	1.10	0.91	0.92
Age Category:				
19 - 24	19%	↑ 1.19	0.97	↓ 0.55
25 - 29	14%	0.98	0.93	1.22
30 - 34	14%	↑ 1.27	↓ 0.75	0.82
35 - 39	14%	0.85	1.09	1.22
40 - 44	12%	0.93	1.01	1.19
45 - 49	9%	0.87	1.15	1.03
50 - 59	13%	0.86	1.00	1.37
60+	6%	0.85	↑ 1.36	0.59

The first row in the above example (Percent of Regular VL Players) shows the percentage of Regular VL Players in Nova Scotia falling into each VL Player segment.

The results show that 62% of Regular VL Players in the province are male with the remaining 38% female (Total VLT Players column). While there were significant differences noted among gender categories for the penetration of Infrequent VL Players (males: 43% versus females: 51%), when compared to overall penetration for all Regular VL Players (46%), the incidence of Infrequent VL Players is not different for either male or female players. In fact, compared to the Regular VL Player population, there are no significant differences in market penetration of any VL Player segments by gender.


However, there are differences evident by age category. There is a higher incidence of Infrequent VL Players for Regular VL Players who are between the ages of 19 and 24 (1.19). As a result, the incidence of Problem VL Players is significantly lower for players in this age category (0.55) than is found for Regular VL Players overall. For the remaining age categories, there are no significant differences with regard to the incidence of Problem VL Players. This suggests that, in general, age is not a distinguishing characteristic of problem VL gambling, although if a player is under 25 years of age, he/she is less likely to be a Problem VL Player.

DEMOGRAPHIC PROFILE OF VL PLAYER SEGMENTS

TABLE 3.1.1

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Gender:					
Male	62%	58%	66%	65%	----
Female	38%	42%	34%	35%	----
Age Category:					
19 - 24	19%	22%	18%	10%	-8%
25 - 29	14%	14%	13%	17%	----
30 - 34	14%	17%	10%	11%	----
35 - 39	14%	12%	15%	17%	----
40 - 44	12%	11%	12%	14%	----
45 - 49	9%	8%	11%	9%	----
50 - 59	13%	11%	13%	18%	----
60+	6%	5%	8%	3%	-5%
Marital Status:					
Single/Never married	32%	30%	33%	32%	----
Married/Cohabiting	57%	58%	57%	53%	----
Divorced/Widowed/Separated	11%	11%	9%	15%	6%
Number Of Adults In Household:					
One	15%	15%	15%	13%	----
Two	55%	56%	53%	58%	----
Three	19%	19%	20%	20%	----
Four or more	11%	11%	12%	9%	----
Average number of adults	2.3	2.3	2.3	2.3	----
Children In Household:					
No children	59%	54%	61%	65%	----
One or more children	41%	46%	39%	35%	----
Average number of children	0.7	0.8	0.7	0.6	----
Total People In Household:					
One	11%	10%	13%	8%	----
Two	31%	28%	29%	42%	13%
Three	23%	24%	22%	22%	----
Four	21%	21%	23%	19%	----
Five or more	14%	17%	13%	9%	----
Average number of people per household	3.0	3.1	3.0	2.8	----
Household Composition:					
One adult, no children	10%	10%	12%	8%	----
Two adults, no children	28%	25%	28%	37%	9%
Three or more adults, no children	20%	19%	21%	21%	----
One adult with children	4%	5%	3%	5%	----

Two adults with children	37%	41%	35%	29%	----
Household VLT Play:					
Other Casual VLT Players in Household	15%	15%	16%	13%	----
Average # of (other) casual VLT players	0.2	0.2	0.2	0.2	----
Other Regular VLT Players in Household	27%	21%	31%	32%	----
Average # of (other) regular VLT players	0.3	0.2	0.3	0.4	----

 - indicates differences among segments significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).

DEMOGRAPHIC PROFILE OF VL PLAYER SEGMENTS - CONTINUED

TABLE 3.1.1 (Con'd.)

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Occupation Category:					
White collar	14%	14%	15%	13%	----
Grey collar	24%	26%	24%	21%	----
Blue collar	35%	32%	34%	42%	----
Income Supported	27%	28%	26%	25%	----
Work Status:					
Employed full-time	60%	61%	60%	61%	----
Employed part-time	13%	12%	15%	15%	----
Unemployed	6%	5%	7%	5%	----
Student	5%	6%	5%	3%	----
Homemaker	6%	9%	4%	3%	----
Retired	7%	6%	8%	9%	----
Disabled	3%	2%	2%	6%	4%
Education Category:					
Less than grade 9	6%	6%	4%	9%	5%
Grade 9 - 13	45%	42%	47%	50%	----
Trade school/Non-University	26%	27%	27%	23%	----
University without degree	14%	16%	13%	9%	----
University with degree	8%	8%	8%	9%	----
University post graduate degree	1%	1%	1%	2%	----
Summary:					
High school or less	51%	48%	51%	58%	----
Trade school/Vocational	26%	27%	27%	23%	----
University incomplete	14%	16%	13%	9%	----
University degree or more	9%	9%	9%	10%	----
Income Category:					
Less than \$10,000	4%	5%	3%	5%	----
\$10,000 - \$25,000	19%	15%	22%	23%	----
\$25,001 - \$35,000	19%	19%	18%	21%	----
\$35,001 - \$45,000	18%	19%	19%	12%	-7%
\$45,001 - \$60,000	13%	14%	11%	14%	----
\$60,001 - \$75,000	5%	6%	5%	5%	----
More than \$75,000	8%	7%	10%	4%	-6%
Refused	4%	3%	4%	6%	----
Don't know/Unsure	10%	12%	7%	9%	----
Summary:					
Low - less than \$25,000	23%	20%	25%	28%	----
Medium - \$25,000 - \$45,000	37%	38%	37%	33%	----
High - \$45,000 or more	26%	27%	26%	23%	----
Refused/Don't know	13%	14%	11%	15%	----

Number Of People Contributing To Income:					
One	30%	30%	32%	26%	----
Two	58%	56%	57%	63%	----
Three	9%	11%	8%	7%	----
Four or more	3%	2%	3%	4%	----
Average number of people	1.9	1.9	1.8	1.9	----

█ - indicates differences among segments significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).

DEMOGRAPHIC PROFILE OF VL PLAYER SEGMENTS - CONTINUED

TABLE 3.1.1 (Con'd.)

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Mother Tongue:					
English	95%	96%	95%	93%	----
French/Other	5%	4%	5%	7%	----
Area Of Residence:					
Urban	63%	61%	65%	68%	----
Rural	37%	39%	35%	32%	----


█ - indicates differences among segments significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).

MARKET PENETRATION FOR VL PLAYER SEGMENTS - BY DEMOGRAPHIC CATEGORY

TABLE 3.1.2

	Total VLT Players	Infrequent Players	Frequent Players	Problem Players	Total
Percent Of Regular VL Players:	100%	46%	38%	16%	100%
Gender:					
Male	62%	43%	40%	17%	100%
Female	38%	51%	34%	15%	100%
Age Category:					
19 - 24	19%	55%	36%	9%	100%
25 - 29	14%	45%	35%	20%	100%
30 - 34	14%	58%	28%	14%	100%
35 - 39	14%	39%	41%	20%	100%
40 - 44	12%	43%	38%	20%	100%
45- 49	9%	40%	43%	17%	100%
50 - 59	13%	40%	38%	23%	100%
60+	6%	39%	51%	10%	100%
Marital Status:					
Single/Never married	32%	44%	40%	16%	100%
Married/Cohabiting	57%	47%	38%	15%	100%
Divorced/Widowed/Separated	11%	46%	31%	22%	100%
Number Of Adults In Household:					
One	15%	46%	39%	14%	100%
Two	55%	47%	36%	17%	100%
Three	19%	45%	38%	17%	100%
Four or more	11%	45%	41%	14%	100%
Children In Household:					
No children	59%	42%	39%	18%	100%
One or more children	41%	51%	35%	14%	100%
Total People In Household:					
One	11%	43%	45%	12%	100%
Two	31%	42%	35%	22%	100%
Three	23%	49%	35%	16%	100%
Four	21%	45%	41%	14%	100%
Five or more	14%	54%	35%	11%	100%
Household Composition:					
One adult, no children	10%	43%	45%	12%	100%
Two adults, no children	28%	41%	38%	22%	100%
Three or more adults, no children	20%	44%	39%	17%	100%
One adult with children	4%	53%	27%	20%	100%
Two adults with children	37%	51%	36%	13%	100%
Household VLT Play:					
Other Casual VLT Players in Household	15%	47%	39%	14%	100%
Other Regular VLT Players in Household	27%	37%	43%	20%	100%




 - indicates differences among demographic categories (i.e., vertical comparisons) significant at the 90%+ confidence level.


NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).

**MARKET PENETRATION FOR VL PLAYER SEGMENTS - BY DEMOGRAPHIC CATEGORY -
CONTINUED**


TABLE 3.1.2 (Con'd.)

	Total VLT Players	Infrequent Players	Frequent Players	Problem Players	Total
Percent Of Regular VL Players:	100%	46.0%	37.5%	16.5%	100%
Occupation Category:					
White collar	14%	46%	40%	15%	100%
Grey collar	24%	49%	38%	14%	100%
Blue collar	35%	43%	37%	20%	100%
Income Supported	27%	48%	37%	15%	100%
Work Status:					
Employed full-time	60%	46%	37%	17%	100%
Employed part-time	13%	40%	41%	18%	100%
Unemployed	6%	41%	44%	15%	100%
Student	5%	55%	37%	8%	100%
Homemaker	6%	69%	24%	7%	100%
Retired	7%	37%	43%	20%	100%
Disabled	3%	▲ 32%	▲ 32%	▲ 37%	100%
Education Category:					
Less than grade 9	6%	49%	27%	24%	100%
Grade 9 - 13	45%	43%	39%	18%	100%
Trade school/Non-University	26%	47%	39%	15%	100%
University without degree	14%	55%	35%	10%	100%
University with degree	8%	44%	39%	18%	100%
University post graduate degree	1%	****	****	****	****
Summary:					
High school or less	51%	43%	38%	19%	100%
Trade school/Vocational	26%	47%	39%	15%	100%
University incomplete	14%	55%	35%	10%	100%
University degree or more	9%	44%	38%	18%	100%
Income Category:					
Less than \$10,000	4%	53%	28%	19%	100%
\$10,000 - \$25,000	19%	37%	43%	20%	100%
\$25,001 - \$35,000	19%	46%	36%	19%	100%
\$35,001 - \$45,000	18%	48%	41%	11%	100%
\$45,001 - \$60,000	13%	50%	32%	18%	100%
\$60,001 - \$75,000	5%	51%	33%	15%	100%
More than \$75,000	8%	42%	49%	9%	100%
Refused	4%	▲ 35%	▲ 38%	▲ 27%	100%
Don't know/Unsure	10%	55%	29%	16%	100%
Summary:					
Low - less than \$25,000	23%	40%	40%	20%	100%
Medium - \$25,000 - \$45,000	37%	47%	38%	15%	100%
High - \$45,000 or more	26%	48%	38%	15%	100%
Refused/Don't know	13%	49%	32%	19%	100%
Number Of People Contributing To Income:					

One	30%	46%	40%	14%	100%
Two	58%	44%	38%	17%	100%
Three	9%	55%	33%	12%	100%
Four or more	3%	 33%	 44%	 22%	100%

 - indicates differences among demographic categories (i.e., vertical comparisons) significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).


 - due to small sample sizes ($10 < n < 30$), results should be viewed as exploratory.

**** - indicates sample size too small to profile ($n < 11$).

**MARKET PENETRATION FOR VL PLAYER SEGMENTS - BY DEMOGRAPHIC CATEGORY -
CONTINUED**

TABLE 3.1.2 (Con'd.)

	Total VLT Players	Infrequent Players	Frequent Players	Problem Players	Total
Percent Of Regular VL Players:	100%	46%	38%	16%	100%
Mother Tongue:					
English	95%	47%	37%	16%	100%
French/Other	5%	35%	41%	24%	100%
Area Of Residence:					
Urban	63%	44%	39%	18%	100%
Rural	37%	49%	36%	15%	100%

 - indicates differences among demographic categories (i.e., vertical comparisons) significant at the 90%+ confidence level.

NOTE: Percentages may total 100% ±1% due to rounding (i.e., 99% to 101%).

RELATIVE INDEX VALUES FOR VL PLAYER SEGMENTS - BY DEMOGRAPHIC CATEGORY

TABLE 3.1.3

	Total VLT Players	Infrequent Players	Frequent Players	Problem Players
Percent Of Regular VL Players:	100%	46%	38%	16%
Gender:				
Male	62%	0.94	1.06	1.05
Female	38%	1.10	0.91	0.92
Age Category:				
19 - 24	19%	↑ 1.19	0.97	↓ 0.55
25 - 29	14%	0.98	0.93	1.22
30 - 34	14%	↑ 1.27	↓ 0.75	0.82
35 - 39	14%	0.85	1.09	1.22
40 - 44	12%	0.93	1.01	1.19
45- 49	9%	0.87	1.15	1.03
50 - 59	13%	0.86	1.00	1.37
60+	6%	0.85	↑ 1.36	0.59
Marital Status:				
Single/Never married	32%	0.96	1.05	1.00
Married/Cohabiting	57%	1.02	1.00	0.93
Divorced/Widowed/Separated	11%	1.01	0.83	1.37
Number Of Adults In Household:				
One	15%	1.00	1.05	0.88
Two	55%	1.02	0.96	1.05
Three	19%	0.98	1.02	1.03
Four or more	11%	0.98	1.10	0.84
Children In Household:				
No children	59%	0.92	1.05	1.11
One or more children	41%	↑ 1.11	0.93	0.84
Total People In Household:				
One	11%	0.93	1.21	0.73
Two	31%	0.92	0.94	↑ 1.35
Three	23%	1.06	0.94	0.96
Four	21%	0.97	1.09	0.88
Five or more	14%	1.17	0.93	↓ 0.67
Household Composition:				
One adult, no children	10%	0.94	1.19	0.74
Two adults, no children	28%	0.88	1.00	↑ 1.31
Three or more adults, no children	20%	0.96	1.04	1.02
One adult with children	4%	1.16	0.71	1.22
Two adults with children	37%	↑ 1.12	0.95	0.79
Household VLT Play:				
Other Casual VLT Players in Household	15%	1.02	1.05	0.85
Other Regular VLT Players in Household	27%	↓ 0.80	1.15	1.22



- indicates over-indexing or underindexing for each VL player segment, within each demographic category, significant at the 90%+ confidence level when compared to the incidence of the player segment for all VL players.

**RELATIVE INDEX VALUES FOR VL PLAYER SEGMENTS - BY DEMOGRAPHIC CATEGORY -
CONTINUED**

TABLE 3.1.3 (Con'd.)

	Total VLT Players	Infrequent Players	Frequent Players	Problem Players
Percent Of Regular VL Players:	100%	46%	38%	16%
Occupation Category:				
White collar	14%	0.99	1.06	0.88
Grey collar	24%	1.06	1.00	0.84
Blue collar	35%	0.93	1.00	1.21
Income Supported	27%	1.05	0.97	0.93
Work Status:				
Employed full-time	60%	1.01	0.99	1.01
Employed part-time	13%	0.88	1.10	1.10
Unemployed	6%	0.90	1.17	0.89
Student	5%	1.20	0.98	↓ 0.48
Homemaker	6%	↑ 1.50	↓ 0.63	↓ 0.43
Retired	7%	0.80	1.14	1.24
Disabled	3%	▲ 0.69	▲ 0.84	▲↑ 2.24
Education Category:				
Less than grade 9	6%	1.06	0.71	▲↑ 1.48
Grade 9 - 13	45%	0.93	1.04	1.11
Trade school/Non-University	26%	1.02	1.03	0.88
University without degree	14%	↑ 1.19	0.93	↓ 0.63
University with degree	8%	0.95	1.03	1.07
University post graduate degree	1%	****	****	****
Summary:				
High school or less	51%	0.94	1.00	1.15
Trade school/Vocational	26%	1.02	1.03	0.88
University incomplete	14%	↑ 1.19	0.93	↓ 0.63
University degree or more	9%	0.96	1.01	1.10
Income Category:				
Less than \$10,000	4%	1.16	0.75	1.14
\$10,000 - \$25,000	19%	↓ 0.81	1.14	1.22
\$25,001 - \$35,000	19%	1.00	0.95	1.13
\$35,001 - \$45,000	18%	1.05	1.08	↓ 0.66
\$45,001 - \$60,000	13%	1.09	0.86	1.08
\$60,001 - \$75,000	5%	1.12	0.89	0.93
More than \$75,000	8%	0.92	↑ 1.31	↓ 0.53
Refused	4%	▲ 0.75	▲ 1.02	▲ 1.64
Don't know/Unsure	10%	1.20	0.77	0.97
Summary:				
Low - less than \$25,000	23%	0.87	1.07	1.20
Medium - \$25,000 - \$45,000	37%	1.03	1.01	0.90
High - \$45,000 or more	26%	1.04	1.00	0.88
Refused/Don't know	13%	1.08	0.84	1.15
Number Of People Contributing To Income:				

One	30%	1.00	1.06	0.86
Two	58%	0.96	1.02	1.06
Three	9%	1.20	0.87	0.73
Four or more	3%	▲ 0.72	▲ 1.18	▲ 1.35

↑ ↓ - indicates over-indexing or underindexing for each VL player segment, within each demographic category, significant at the 90%+ confidence level when compared to the incidence of the player segment for all VL players.

▲ - due to small sample sizes ($10 < n < 30$), results should be viewed as exploratory. **** - indicates sample size too small to profile ($n < 11$).

**RELATIVE INDEX VALUES FOR VL PLAYER SEGMENTS - BY DEMOGRAPHIC CATEGORY -
CONTINUED**

TABLE 3.1.3 (Con'd.)

	Total VLT Players	Infrequent Players	Frequent Players	Problem Players
Percent Of Regular VL Players:	100%	46%	38%	16%
Mother Tongue:				
English	95%	1.01	1.00	0.98
French/Other	5%	0.77	1.10	↑ 1.43
Area Of Residence:				
Urban	63%	0.95	1.03	1.07
Rural	37%	1.07	0.96	0.89

↑ ↓ - indicates over-indexing or underindexing for each VL player segment, within each demographic category, significant at the 90%+ confidence level when compared to the incidence of the player segment for all VL players.

LIFE STYLE FACTORS

TABLE 3.2.1

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Population:	100%	46%	38%	16%	
Activities Problem Players Do More:					
% who watch TV (not including video tape)	100%	100%	100%	100%	----
Median minutes per week	900	900	900	1200	300
% who play video lottery games	89%	78%	98%	96%	----
Median minutes per week	120	30	120	300	180
Activities Problem Players Do Less:					
% who socialize with others by playing sports, involvement with volunteer organizations and other recreational activities	57%	58%	60%	45%	-15%
Median minutes per week	120	120	120	0	-120
% who are involved with hobbies/crafts/special interests	58%	64%	56%	47%	-9%
Median minutes per week	120	180	120	0	-120
% who play games <u>not</u> for money	66%	67%	67%	58%	-9%
Median minutes per week	60	60	120	60	----
% who socialize with friends/family at home	88%	91%	87%	80%	-7%
Median minutes per week	240	300	240	180	----
Activities Frequent Players and Problem Players Do The Same:					
% who work at their job (at work)	74%	73%	74%	74%	----
Median minutes per week	2400	2400	2400	2400	----
% who relax at home (playing music, gardening etc.)	95%	95%	95%	93%	----
Median minutes per week	600	600	600	600	----
% who do household chores	95%	97%	94%	93%	----
Median minutes per week	420	420	420	420	----
% who socialize with friends or family at their home	87%	89%	86%	87%	----
Median minutes per week	240	240	189	180	----
% who socialize with friends or family at bars	69%	68%	71%	64%	----
Median minutes per week	120	120	138	120	----
% who play other games to win money	31%	30%	30%	34%	----
Median minutes per week	0	0	0	0	----
% who work at home (if in the workforce)	13%	11%	15%	13%	----
Median minutes per week	0	0	0	0	----

LIFE STYLE FACTORS - CONTINUED

TABLE 3.2.2

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Population:	100%	46%	38%	16%	
Activities Problem Players Do Less:					
% who go out to visit friends	91%	93%	92%	80%	-12%
Average times per month	6.8	7.0	7.1	5.6	-1.5
% who go out to visit family	87%	87%	88%	87%	----
Average times per month	6.3	6.0	7.1	5.1	-2.0
% who eat out at restaurants (not during work hours)	86%	86%	90%	79%	-11%
Average times per month	3.6	3.5	3.9	3.0	-0.9
% who rent or watch video tapes	77%	80%	76%	68%	-8%
Average times per month	4.1	4.2	4.0	3.9	----
% who travel for business/pleasure (<u>days</u> of travel)	44%	43%	49%	34%	-15%
Average times per month	2.0	2.0	2.2	1.4	-0.8
% who attend live sports events	38%	39%	40%	29%	-11%
Average times per month	1.2	1.2	1.3	1.0	----
% who go out to movies	35%	37%	36%	29%	----
Average times per month	0.7	0.7	0.7	0.4	-0.3
% who go to the library, museum, educational or historic sites	33%	34%	37%	23%	-14%
Average times per month	1.2	1.2	1.2	1.1	----
% who go to church/synagogue	29%	29%	33%	22%	-11%
Average times per month	1.0	1.0	1.1	0.6	-0.5
% who are involved in community clubs or organizations	21%	19%	24%	16%	-8%
Average times per month	0.9	0.9	1.0	0.7	----
Activities Frequent & Problem Players Do The Same:					
% who attend live entertainment	28%	28%	30%	24%	----
Average times per month	0.5	0.5	0.5	0.4	----
% who are involved in other volunteer work	20%	19%	22%	16%	----
Average times per month	0.8	0.8	0.8	0.8	----
Monthly Expenditure on Entertainment Activities (excluding VLT's):					
Median amount	\$75	\$60	\$100	\$55	-\$45
Average amount	\$117	\$102	\$141	\$105	-\$36
Frequency of Bar, Club, Pub or Lounge Patronage:					
More than once a week	25%	13%	34%	41%	----
Once a week or more	57%	40%	73%	73%	----
Once every two weeks or more	74%	65%	81%	88%	7%
Once a month or more	87%	86%	88%	92%	----

Less than once a month	7%	8%	6%	5%	----
Do not go	6%	6%	6%	3%	----

ATTITUDES AND MOTIVES TOWARDS VL GAMBLING

TABLE 3.3

	Total VL Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Enjoyment From Playing:					
Video lottery games are a fun and entertaining way for me to pass time	45%	39%	52%	43%	-9%
I really enjoy playing VL games	48%	39%	56%	54%	----
I find playing VL games to be an enjoyable part of a visit to an establishment	41%	35%	48%	44%	----
My friends and I enjoy playing VL games when we go out together	30%	24%	35%	38%	----
Playing VL games is a great way to pass time with friends	26%	24%	30%	24%	----
Ability To Influence Play:					
I feel I can improve my chances of winning by using certain strategies or betting systems	13%	8%	13%	27%	14%
Everyone has the same chance of winning when they play the VL line games such as Swinging Bells	61%	63%	63%	52%	-11%
I consider myself knowledgeable on how best to play and win some VL games	19%	13%	23%	26%	----
Belief That Video Lottery Can Pay Off:					
I sometimes play VL games with the hope of paying off bills	10%	3%	4%	45%	41%
I usually feel I'm going to win when I start playing VL games	24%	18%	21%	50%	29%
I generally feel that over time VL will pay off for me	11%	8%	9%	25%	16%
After a string or series of losses playing VL games I feel I am more likely to win	9%	5%	8%	23%	15%
Desire To Play More Often (Obsessed):					
I would like to play VL games almost everyday	8%	2%	7%	29%	22%
I would like to spend most of my extra time on video lottery play	5%	1%	3%	23%	20%
I wish I could play VL games more often	8%	4%	5%	25%	20%
Perceived Ability To Stop (Control):					
I sometimes find it hard to stop playing video lottery games, when I know I should	18%	4%	9%	75%	66%
I would prefer that VL machines were only available in 3 or 4 restricted places	43%	39%	32%	78%	46%

within Nova Scotia					
I can give up playing VL games anytime I want to	77%	91%	79%	34%	-45%
I consider myself to be a serious VL player	11%	1%	6%	48%	42%
Most times I am in a place that has machines, I want to play them	26%	11%	26%	65%	39%
Other:					
I play video lottery games to forget my troubles or worries	7%	2%	4%	28%	24%

ATTITUDES AND MOTIVES TOWARDS VL GAMBLING - CONTINUED

TABLE 3.3 (Con'd.)

	Total VL Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Reasons For Playing Video Lottery Games:					
Reasons Where Frequent Players and Problem Players Are Different:					
Fun/Entertainment/Enjoyment	53%	51%	59%	42%	-17%
Fill time/Something to do	37%	39%	42%	20%	-22%
I'm addicted/Compulsive gambler/Urges to play	8%	2%	1%	38%	37%
Play on impulse/when I see them/on a whim/ Because they're there	5%	7%	3%	7%	4%
Drawn to them/Fascinating/Mesmerizing	1%	<1%	1%	6%	5%
Reasons Where Frequent Players and Problem Players Are The Same:					
To win money/Chance to win	27%	29%	26%	21%	----
For the challenge/To gamble	6%	6%	4%	8%	----
To socialize (with other players, friends, family)/ Get out of the house	5%	7%	4%	4%	----
Relaxation/Distraction/Get away from problems	4%	2%	5%	5%	----
Adrenaline rush/Get a high	1%	1%	<1%	2%	----
A habit/Just something I do	<1%	<1%	<1%	1%	----
Other (See verbatim listing)	<1%	----	<1%	2%	----
Don't know/Unsure	<1%	----	1%	----	----
Chance Of Winning Depends On...					
Specific Machines/Games:					
Where you play, that is, some places have machines that are more likely to win	54%	16%	22%	43%	21%
The particular type of VL game such as Swinging Bells or Aces Fever	23%	23%	18%	36%	18%
The machine, that is, specific machines are more likely to provide wins	23%	17%	23%	39%	16%
The make of the machine such as Spielo or VLC	23%	7%	10%	18%	8%
How recently someone won at that machine	10%	49%	57%	60%	----
Time:					
The time of day	19%	16%	16%	36%	20%
The day of week	19%	16%	18%	32%	14%
Size of Wager/Bonus:					

The size of the bonus if there is one	44%	41%	47%	46%	----
The size of the bet	39%	37%	35%	52%	17%
Skill Level:					
The skill of the player	40%	16%	15%	22%	7%
Your ability to hit the stop button at the right place if the stop button feature is available	17%	39%	39%	44%	----

SITUATIONAL FACTORS

TABLE 3.4

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Number of times last month they were in a location that has video lottery machines	10.9	7.7	13.8	13.5	----
Went specifically to play video lottery games	2.7	0.7	3.3	6.8	3.5
Went for other reasons but ended up playing VL's	2.6	1.5	4.0	2.6	-1.4
Total times played VL's at a location	5.3	2.2	7.4	9.4	2.0
Average <u>percent</u> of times they were in a location with video lottery machines that they had gone specifically to play VL's	25%	14%	27%	53%	26%
Average <u>percent</u> of times they were in a location with video lottery machines for another reason but ended up playing VL's	32%	31%	38%	21%	-17%
Average <u>percent</u> of times they were in a location with video lottery machines and played VL's	58%	46%	65%	73%	----
Of the times they played VL's, average percent of times they had gone specifically to play video lottery machines	41%	32%	40%	66%	26%
Number of places in the last month where they played video lottery machines	2.9	2.1	3.6	3.6	----
Number of regular locations	1.2	0.8	1.4	1.8	0.4
Number of regular locations close to home	0.8	0.6	0.9	1.4	0.5
A regular play location is located close to home	81%	77%	81%	92%	11%
Two or more regular VL play locations are close to home	25%	19%	25%	44%	19%
Number of non-regular locations at which they played in the last three months	1.7	1.3	2.2	1.7	0.5
<u>Percent</u> of regular locations that are close by	75%	73%	74%	82%	8%
Average <u>percent</u> of total locations played in last three months that are not their regular locations	46%	50%	44%	39%	----
Other Means of Getting Money to Play (Beside Bringing Cash):					
Sometimes use their bank card to get more money to continue playing that day	18%	6%	16%	56%	40%
Leave the premises to use bank card	10%	3%	9%	32%	23%
Use card on location	11%	4%	10%	32%	22%

Locations they play at that offer credit so they can continue to play VL games:	4%	3%	4%	7%	----
Number Of Times This Service Was Used:					
Never (0%)	98%	100%	98%	94%	-4%
Rarely (<25%)	1%	<1%	1%	4%	----
Occasionally (25% to 50%)	<1%	----	1%	----	----
Frequently (50%+)	<1%	----	<1%	1%	----
Almost every time (≈100%)	<1%	----	----	1%	----
Locations they play at that allow them to cash a cheque so they can continue to play:	10%	8%	11%	15%	----
Number Of Times This Service Was Used:					
Never (0%)	96%	99%	97%	89%	-8%
Rarely (<25%)	2%	<1%	2%	9%	7%
Occasionally (25% to 50%)	1%	1%	1%	3%	----
Frequently (50%+)	----	----	----	----	----
Almost every time (≈100%)	----	----	----	----	----

SITUATIONAL FACTORS - CONTINUED

TABLE 3.4 (Con'd.)

	Total VLT Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Prevalence of Situational Factors Relevant to Video Lottery Play:					
Co-workers or fellow students play video lottery	41%	36%	44%	48%	----
Play when traveling for business purposes	7%	5%	9%	11%	----
Have specific situations where they spend too much money	18%	9%	12%	54%	42%
Situations Where Players Say They Spend Too Much:					
Location Specific Factors:					
When drinking/drinking too much	5%	4%	3%	14%	11%
When I'm out in a bar - dancing, playing pool	1%	1%	1%	3%	----
When I play by myself	1%	<1%	<1%	1%	----
Passing Time:					
When I'm bored/killing time/have extra time	3%	1%	2%	9%	7%
Days off work - weekends, vacations, laid off	1%	<1%	1%	3%	----
Before, after and during work	1%	<1%	2%	2%	----
When I travel	<1%	<1%	----	1%	----
Need To Escape:					
When I play to escape problems/fighting at home	1%	----	1%	6%	5%
When I'm upset/depressed/frustrated	1%	----	<1%	3%	----
Need For Cash:					
When I'm short of money	3%	1%	2%	8%	6%
Cash Is Available:					
On payday	1%	1%	1%	4%	----
When I have extra cash/bank card with me	1%	<1%	1%	3%	----
Percent who found themselves in the above situations within the last three months	15%	5%	11%	52%	41%
Frequently or always found themselves in the above situations within the last three months	5%	1%	1%	27%	26%
Percent who have close friends who play video lottery games regularly:	73%	70%	77%	71%	----
Percent who have family or close relatives (household) who play VL games regularly:	39%	35%	40%	46%	----
Percent who work outside the home:	75%	74%	75%	78%	----

Percent who attend school outside the home:	9%	11%	10%	4%	-6%
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SITUATIONAL FACTORS - CONTINUED**TABLE 3.4 (Con'd.)**

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
VL Machines Located At Work Or School:					
VL machines on premises	7%	7%	9%	3%	-6%
VL machines located nearby	15%	14%	15%	21%	----
Played video lottery machines during working or school hours in the last three months:	9%	4%	12%	15%	----
Percent who played on breaks/between classes	4%	1%	7%	6%	----
Percent who played at lunch time	5%	3%	7%	7%	----
Percent who played at other times	3%	1%	3%	8%	5%
Other Adults In Household Who Play VL Games:					
Average number of adults per household	2.3	2.3	2.3	2.3	----
Other adults in household who play video lottery games occasionally	15%	15%	16%	13%	----
Average number of adults in household who play occasionally	0.2	0.2	0.2	0.2	----
Other adults in household who play video lottery games regularly	27%	21%	31%	32%	----
Average number of adults in household who play regularly	0.3	0.2	0.3	0.4	----

GENERAL GAMBLING PLAY AND AVERAGE EXPENDITURE

TABLE 3.5

	Total VLT Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Games Where Frequent and Problem Players Are Different:					
Play of casino games excluding slot machines	26%	23%	33%	18%	-15%
Average expenditure in last month	\$5.98	\$4.11	\$8.83	\$4.74	----
Charity raffles	66%	65%	70%	60%	-10%
Average expenditure in last month	\$3.78	\$4.35	\$3.20	\$3.52	----
Other sports bets/pools	16%	15%	19%	12%	-7%
Average expenditure in last month	\$1.39	\$1.75	\$1.04	\$1.20	----
Play slot machines at casinos	57%	55%	57%	60%	----
Average expenditure in last month	\$11.17	\$5.87	\$9.55	\$29.70	\$20.15
Play Sport Select Proline	15%	12%	18%	15%	----
Average expenditure in last month	\$1.93	\$1.57	\$2.69	\$1.21	-\$1.48
Play the horses	7%	5%	9%	11%	----
Average expenditure in last month	\$2.60	\$0.55	\$6.16	\$0.21	-\$5.95
Games Where Frequent and Problem Players Are Similar:					
Frequently play Lotto 6/49	61%	57%	64%	63%	----
Average expenditure in last month	\$17.17	\$12.45	\$19.14	\$25.91	----
Frequently play \$1.00 Scratch n' Wins	33%	33%	32%	33%	----
Average expenditure in last month	\$5.17	\$4.02	\$6.52	\$5.32	----
Frequently play \$2.00 Scratch n' Wins	36%	36%	37%	36%	----
Average expenditure in last month	\$6.47	\$5.17	\$7.12	\$8.62	----
Play Breakopen/Pull-tab tickets	43%	40%	45%	46%	----
Average expenditure in last month	\$2.60	\$1.46	\$2.71	\$5.53	----
Play Bingo for money	32%	31%	33%	32%	----
Average expenditure in last month	\$12.54	\$11.94	\$11.37	\$16.94	----
Play Cards for money	31%	28%	34%	33%	----
Average expenditure in last month	\$5.09	\$2.81	\$7.42	\$6.15	----
Play other types of betting (excluding VLT's)	2%	1%	3%	5%	----
Average expenditure in last month	\$0.37	\$0.03	\$0.66	\$0.68	----
None of the above	1%	2%	<1%	1%	----

VIDEO LOTTERY PLAY BEHAVIOUR

TABLE 3.6

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Average length of time they have been playing video lottery games (months)	42.6	39.9	40.5	54.9	14.4
Like video lottery games compared to other games of chance you can play for money	43%	32%	51%	56%	----
Average number of times per month that they played video lottery machines during the last three months (reported)	4.8	1.6	7.2	8.0	----
Average number of times they played VL machines in the last month (derived)	5.3	2.2	7.4	9.4	2.0
Amount of Time Spent Playing Video Lottery Games Each Time They Played:					
Average amount of time spent playing VL's each time they played (minutes)	69.7	43.3	66.8	150.1	83.2
Varies/Depends on how well I did	2%	1%	3%	4%	----
Average estimated minutes spent playing video lottery machines per visit	91.5	62.0	85.0	188.9	----
Out of pocket (excluding winnings) average amount spent on video lottery <u>each time they play</u>	\$32.11	\$16.33	\$29.44	\$82.29	\$52.85
Average estimated amount spent <u>per visit</u> playing video lottery machines	\$47.08	\$23.61	\$35.00	\$97.37	\$62.37
Average estimated monthly amount spent out of pocket on video lottery games (in the last three months)	\$145.25	\$29.79	\$146.69	\$473.83	\$327.14
Median estimated monthly amount spent out of pocket on video lottery games in the last three months	\$75	\$20.00	\$80.00	\$240.00	\$160.00
Average derived amount spent <u>per month</u> playing video lottery machines	\$243.52	\$53.49	\$228.50	\$808.88	\$580.38
Percent with one or more regular locations where they usually play video lottery games	72%	61%	80%	84%	----
Average number of regular VLT play locations	1.2	0.8	1.4	1.8	0.4
Average number of other different locations where they played VL's during the last three months	1.7	1.3	2.2	1.7	----

VIDEO LOTTERY PLAY BEHAVIOUR - CONTINUED

TABLE 3.6 (Con'd.)

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Frequency of Playing Video Lottery Games at...					
Legion/community centers:					
Never	63%	68%	62%	56%	----
Rarely	11%	10%	11%	14%	----
Occasionally	9%	8%	9%	11%	----
Regularly (Once +/-month)	17%	15%	18%	20%	----
Sporting establishments (e.g., pool halls, bowling alley, curling, golf courses etc.):					
Never	63%	69%	60%	56%	----
Rarely	12%	10%	13%	13%	----
Occasionally	10%	9%	12%	11%	----
Regularly (Once +/-month)	14%	12%	14%	21%	7%
Airports:					
Never	88%	91%	87%	80%	-7%
Rarely	10%	7%	10%	16%	6%
Occasionally	2%	1%	2%	3%	----
Regularly (Once +/-month)	<1%	1%	1%	----	
Bars, pubs, lounges, licensed restaurants (other than airports):					
Never	11%	12%	12%	9%	----
Rarely	8%	8%	7%	9%	----
Occasionally	16%	18%	15%	15%	----
Regularly (Once +/-month)	64%	62%	65%	68%	----
Don't know/Unsure	<1%	<1%	1%	----	----
Native gambling establishments:					
Never	86%	92%	82%	78%	----
Rarely	6%	2%	9%	9%	----
Occasionally	3%	1%	4%	4%	----
Regularly (Once +/-month)	5%	4%	4%	9%	5%
Don't know/Unsure	<1%	<1%	----	----	----
Other locations:					
Never	91%	93%	87%	93%	6%
Rarely	4%	3%	5%	3%	----
Occasionally	2%	2%	3%	----	----
Regularly (Once +/-month)	3%	2%	4%	3%	----
Days of The Week That They Play Video Lottery Games:					
Monday	5%	4%	7%	6%	----
Tuesday	6%	4%	8%	6%	----
Wednesday	7%	4%	9%	14%	----
Thursday	13%	7%	19%	15%	----

Friday	34%	33%	37%	31%	----
Saturday	33%	35%	31%	33%	----
Sunday	9%	10%	9%	9%	----
Most Days/Every Day	3%	----	3%	9%	6%
No Particular Day	48%	40%	36%	41%	----

VIDEO LOTTERY PLAY BEHAVIOUR - CONTINUED

TABLE 3.6 (Con'd.)

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Time of Weekday They Play The Video Lottery Games:					
Mornings (9:00 a.m. - 11:30 a.m.)	3%	2%	3%	3%	----
Lunchtime (11:30 a.m. - 2:00 p.m.)	6%	3%	7%	9%	----
Afternoons (2:00 p.m. - 4:30 p.m.)	7%	5%	6%	17%	11%
Suppertime (4:30 p.m. - 7:00 p.m.)	9%	6%	10%	19%	9%
Early evening (7:00 p.m. - 10:00 p.m.)	26%	22%	30%	32%	----
Late evening (after 10:00 p.m.)	14%	10%	16%	16%	----
Varies/No particular time	25%	29%	22%	21%	----
Other (See verbatim listing)	<1%	----	<1%	----	----
Don't play on weekdays	23%	29%	18%	15%	----
Time of Weekend They Play The Video Lottery Games:					
Mornings (9:00 a.m. - 11:30 a.m.)	2%	1%	2%	4%	----
Lunchtime (11:30 a.m. - 2:00 p.m.)	4%	2%	4%	6%	----
Afternoons (2:00 p.m. - 4:30 p.m.)	9%	6%	8%	21%	13%
Suppertime (4:30 p.m. - 7:00 p.m.)	9%	8%	8%	13%	----
Early evening (7:00 p.m. - 10:00 p.m.)	28%	30%	25%	31%	----
Late evening (after 10:00 p.m.)	19%	21%	16%	20%	----
Varies/No particular time	28%	29%	27%	26%	----
Other (See verbatim listing)	<1%	----	<1%	----	----
Don't play on weekends	17%	15%	21%	14%	----
Percent who played video lottery games in more than one location in a single day during the last three months	17%	6%	19%	44%	25%
Frequency of Playing Video Lottery Games in More Than One Location in a Single Day:					
Rarely (less than 25% of the time)	9%	4%	11%	17%	----
Occasionally (25% to 50% of the time)	4%	1%	4%	13%	9%
Frequently (50% or more)	2%	----	3%	9%	6%
Almost every day you play (≈100% of the time they play)	1%	----	1%	4%	----
% who play VL games once per visit	83%	85%	82%	80%	----
% who play VL games more than once per visit	17%	15%	18%	20%	----
Average number of times played per visit	1.4	1.4	1.3	1.4	----
Video Lottery Games Played During The Last Three Months:					
Line Games:					
Swinging Bells	85%	89%	84%	75%	-9%

Lucky 7	2%	2%	1%	5%	4%
Lucky 8 Line	1%	<1%	1%	2%	----
Red Hot 7's	< 1%	----	1%	----	----
Lotto 5 Line	< 1%	<1%	----	----	----
Card Games:					
Poker (Joker Poker, Fever Poker, etc.)	16%	13%	18%	24%	----
Aces Fever	13%	8%	16%	21%	----
Blackjack	1%	1%	<1%	----	----
Other:					
Keno (Bonus Keno, Keno Wild, Classic Keno)	1%	<1%	<1%	2%	----

VIDEO LOTTERY PLAY BEHAVIOUR - CONTINUED

TABLE 3.6 (Con'd.)

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Average Amount Of Money Brought To A Location At One Time To Spend On VLT Play:					
Average amount brought to a location to spend at one time playing video lottery machines	\$28.50	\$16.48	\$23.34	\$73.93	\$50.59
No specific amount/spend cash on-hand	2%	2%	3%	3%	----
Varies, depends on the situation	2%	2%	1%	7%	6%
Whatever money is left over after beer/food	1%	1%	----	----	----
Average amount put in the machine to start	\$6.76	\$5.49	\$5.88	\$12.34	\$6.46
Average bet level for each play or spin (credits)	12.6	11.0	12.0	18.5	6.5
Median bet level for each play or spin (credits)	8	8	9	14	5
Value of Credit:					
5¢	92%	91%	93%	91%	----
Other	6%	6%	6%	4%	----
Varies	<1%	----	<1%	1%	----
Don't know/Unsure	2%	3%	----	3%	----
Average Cost Per Play or Spin	\$0.75	\$0.66	\$0.71	\$1.12	\$0.41
Percent who feel they must have all bets covered when playing line games (e.g., Swinging Bells)	63%	57%	63%	84%	21%
Percent Who Bet The Maximum Amount Possible Each Play (Max Bet):					
Never (0%)	47%	56%	47%	21%	-26%
Rarely (<25%)	33%	31%	35%	35%	----
Occasionally (25% to 50%)	12%	9%	14%	19%	----
Frequently (50%+)	5%	3%	3%	18%	15%
Almost Always (≈100%)	2%	1%	2%	7%	5%
Frequency of Spending <u>All</u> Money That Is Brought To Play Video Lottery Machines:					
Never (0%)	10%	12%	12%	2%	-10%
Rarely (<25%)	11%	10%	13%	7%	-6%
Occasionally (25% to 50%)	21%	24%	21%	10%	-11%
Frequently (50%+)	22%	20%	21%	33%	12%
Almost Always (≈100%)	36%	33%	33%	48%	15%
Frequency of Getting More Money In Order To Continue Playing On That Day:					

Never (0%)	61%	78%	57%	23%	-34%
Rarely (<25%)	23%	16%	30%	27%	----
Occasionally (25% to 50%)	11%	5%	11%	25%	14%
Frequently (50%+)	3%	1%	<1%	17%	16%
Almost Always (≈100%)	2%	<1%	2%	8%	6%
Frequency of Borrowing Money From Others Where You Are Playing In Order To Continue To Play:					
Never (0%)	90%	96%	91%	73%	-18%
Rarely (<25%)	7%	3%	7%	19%	12%
Occasionally (25% to 50%)	2%	1%	1%	5%	----
Frequently (50%+)	1%	----	<1%	3%	----
Almost Always (≈100%)	<1%	<1%	----	----	----
Frequency of Lending Money To Others So That They Can Continue To Play:					
Never (0%)	65%	72%	61%	54%	----
Rarely (<25%)	16%	15%	16%	19%	----
Occasionally (25% to 50%)	16%	12%	20%	21%	----
Frequently (50%+)	2%	1%	3%	7%	4%
Almost Always (≈100%)	<1%	1%	<1%	----	----

VIDEO LOTTERY PLAY BEHAVIOUR - CONTINUED

TABLE 3.6 (Con'd.)

	Total VLT Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Frequency Of Time I Increase My Bet Level In Order To Win Back Money I Have Lost:					
Never (0%)	56%	69%	55%	20%	-35%
Rarely (<25%)	19%	15%	26%	16%	-10%
Occasionally (25% to 50%)	17%	14%	16%	30%	14%
Frequently (50%+)	5%	1%	2%	21%	19%
Almost Always (≈100%)	3%	1%	1%	13%	12%
Frequency Of Time I Exceed The Amount Of Money I Intended To Spend In Order To Win Back Money I Have Lost:					
Never (0%)	52%	69%	50%	8%	-42%
Rarely (<25%)	29%	24%	37%	23%	-14%
Occasionally (25% to 50%)	11%	6%	10%	26%	16%
Frequently (50%+)	4%	1%	1%	21%	20%
Almost Always (≈100%)	4%	----	2%	22%	20%
After losing, the percent who have ever gone back to the video lottery establishment later that day or another day to try and win back their money:	24%	9%	19%	76%	57%
After losing, the percent who have gone back later that day or another day to try and win back their money <i>within the last three months</i> :	13%	3%	10%	51%	41%
After losing, the percent who have gone back later that day or another day to try and win back their money <i>within the last six months</i> :	18%	5%	15%	64%	39%
After losing, the percent who have gone back later that day or another day to try and win back their money <i>within the last year</i> :	22%	7%	19%	72%	53%
After losing on other gambling activities, the percent who have tried to win back their money by playing VL games:	15%	2%	6%	21%	15%
After losing on other gambling activities, the percent who have tried to win back their money in the last three months by playing VL games:	5%	1%	4%	17%	13%
Percent who have ever chased after VL and/or any other gambling losses:	25%	9%	21%	78%	57%

VIDEO LOTTERY PLAY BEHAVIOUR - CONTINUED

TABLE 3.6 (Con'd.)

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
What Are You Most Likely To Do With Your Winnings?					
For A \$20.00 Win:					
Spend on more VL Play	37%	26%	34%	74%	40%
Buy Drinks/alcohol	30%	33%	27%	28%	----
Spend it on something else	24%	26%	28%	13%	-15%
Pocket it	57%	65%	60%	32%	-28%
Don't know/Unsure	1%	<1%	1%	2%	----
For A \$50.00 Win:					
Spend on more VL Play	28%	17%	29%	58%	29%
Buy Drinks/alcohol	20%	19%	20%	22%	----
Spend it on something else	22%	22%	24%	15%	-9%
Pocket it	78%	87%	78%	54%	-24%
Don't know/Unsure	1%	<1%	<1%	3%	----
For A \$100.00 Win:					
Spend on more VL Play	22%	13%	21%	48%	27%
Buy Drinks/alcohol	13%	12%	13%	15%	----
Spend it on something else	20%	19%	23%	15%	-8%
Pocket it	86%	93%	86%	68%	-18%
Don't know/Unsure	1%	1%	----	3%	----
Percent who jam the machine so it plays automatically:	19%	9%	21%	39%	18%
Jam the machine rarely (<25%)	7%	4%	7%	15%	8%
Jam the machine occasionally (25% to 50%)	8%	3%	11%	15%	----
Jam the machine frequently (50%+)	3%	2%	2%	8%	6%
Jam the machine always (≈100%)	1%	<1%	1%	1%	----
In The Last Three Months, Frequency Of Playing More Than One Machine At The Same Time:					
Never (0%)	86%	96%	85%	64%	-21%
Rarely (<25%)	9%	3%	11%	17%	----
Occasionally (25% to 50%)	3%	<1%	3%	13%	10%
Frequently (50%+)	1%	----	1%	5%	----
Almost Always (≈100%)	<1%	<1%	<1%	1%	----
Percent who prefer to play a particular machine at the location they play because they feel it is lucky:	18%	9%	19%	39%	20%
% who do something while playing the games to try and improve their chances of winning:	15%	10%	15%	28%	13%

Things People Do To Improve Their Chances Of Winning:					
Change bet levels (raise, drop, fluctuate, special series of bets)	6%	4%	6%	12%	6%
Use the stop button feature/Quick stops	5%	2%	5%	10%	5%
Rub/Kick the machine	1%	1%	<1%	2%	----
Talk to the machine	1%	<1%	1%	----	----
Pray	1%	1%	1%	1%	----
Change the screen/Game (switch to Aces Fever (screen), help screen, pay table)	1%	1%	1%	----	----
Play specific machine(s) (i.e., machines that haven't been played much that day/play machines that people lose on)	<1%	----	1%	1%	----

VIDEO LOTTERY PLAY BEHAVIOUR - CONTINUED

TABLE 3.6 (Con'd.)

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Things People Do To Improve Their Chances Of Winning (Continued):					
Cross my fingers	<1%	1%	----	1%	----
Count cards/Sevens - try to anticipate which cards will come up/when sevens will come up	1%	<1%	1%	3%	----
Put a lucky charm on the machine/Bring a lucky charm	<1%	----	<1%	----	----
Put more money in the machine	<1%	----	----	2%	----
Keep play button pressed	<1%	----	----	1%	----
Play with someone else	<1%	<1%	<1%	1%	----
Switch/Change seats or hands pushing buttons	<1%	----	<1%	----	----
Other (See verbatim listing)	<1%	----	----	1%	----
Refused (Trade secret - can't tell you)	<1%	<1%	<1%	----	----
Importance Of Using The Above System When You Play:					
Not at all important	6%	6%	6%	5%	----
Somewhat important	6%	3%	6%	14%	8%
Very important	3%	1%	3%	9%	6%
Percent Who Have Superstitions Or Rituals When Playing Video Lottery Games:	8%	6%	6%	16%	10%
Superstitions or Rituals Used When Playing The Video Lottery Games:					
Change bet levels (raise, drop, fluctuate, special series of bets, "lucky" bet level)	2%	2%	2%	3%	----
Use the stop button feature	1%	1%	1%	----	----
Put a lucky charm on the machine/Bring a lucky charm	1%	1%	1%	3%	----
Rub/Kick the machine	1%	1%	<1%	1%	----
Keep "bad luck" thoughts/people away	1%	<1%	1%	1%	----
Talk to the machine/Chant	<1%	----	1%	1%	----
Play specific machine(s) (i.e., machines that haven't been played much that day/play machines that people lose on)	<1%	----	----	2%	----
Cross my fingers	<1%	----	----	1%	----
Pray	<1%	----	----	2%	----
Change the screen/Game (switch to Aces Fever (screen), help screen, pay table)	<1%	----	----	1%	----

Count cards/Sevens - try to anticipate which cards will come up/when sevens will come up	<1%	1%	<1%	----	----
Put more money in the machine	<1%	<1%	----	1%	----
Play with someone else	<1%	<1%	----	----	----
Watch what I say/what others say to me	<1%	----	----	1%	----
Always smoke	<1%	1%	----	----	----
Switch/Change seats or hands pushing buttons	<1%	<1%	----	2%	----
Other (See verbatim listing)	1%	1%	1%	1%	----
Refused (Trade secret - can't tell you)	<1%	----	<1%	----	----
Don't know/Unsure	<1%	----	----	1%	----

VIDEO LOTTERY PLAY BEHAVIOUR - CONTINUED

TABLE 3.6 (Con'd.)

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Frequency Of Time I Feel Uncomfortable Because Other People Are Watching Me Play:					
Never (0%)	71%	80%	73%	43%	-30%
Rarely (<25%)	14%	11%	16%	17%	----
Occasionally (25% to 50%)	7%	6%	6%	14%	8%
Frequently (50%+)	4%	2%	2%	15%	13%
Almost Always (≈100%)	4%	1%	4%	12%	8%
% who have lost track of time while playing:	35%	23%	32%	77%	45%
Frequency Of Times, During The Past Three Months, That I Have Lost Track Of Time While Playing Video Lottery:					
Never (0%)	69%	83%	70%	25%	-45%
Rarely (<25%)	15%	11%	17%	23%	----
Occasionally (25% to 50%)	9%	4%	9%	21%	12%
Frequently (50%+)	4%	1%	2%	20%	15%
Almost Always (≈100%)	3%	<1%	2%	12%	10%
Do You Tend To Sit or Stand While Playing Video Lottery Games?					
Sit while playing video lottery games	67%	62%	71%	73%	----
Stand while playing video lottery games	27%	32%	23%	18%	----
Sit and stand while playing video lottery games	6%	6%	6%	9%	----
In The Last Three Months, Frequency Of Playing The Same Machine With Friends Or Acquaintances:					
Never (0%)	39%	44%	35%	33%	----
Rarely (<25%)	21%	21%	19%	26%	----
Occasionally (25% to 50%)	23%	19%	29%	23%	----
Frequently (50%+)	11%	10%	11%	13%	----
Almost Always (≈100%)	6%	7%	6%	5%	----
In The Last Three Months, Frequency Of Playing On A Nearby Machine With Friends Or Acquaintances:					
Never (0%)	26%	28%	26%	22%	----
Rarely (<25%)	21%	20%	22%	21%	----
Occasionally (25% to 50%)	32%	34%	29%	32%	----
Frequently (50%+)	14%	12%	16%	16%	----
Almost Always (≈100%)	6%	6%	6%	9%	----
Frequency Of Time I Have Trouble Stopping/Quitting Play When I'm Ahead:					
Never (0%)	53%	67%	53%	12%	-41%
Rarely (<25%)	17%	14%	22%	12%	-10%
Occasionally (25% to 50%)	17%	14%	18%	24%	----
Frequently (50%+)	7%	3%	4%	22%	18%

Almost Always ($\approx 100\%$)	7%	2%	3%	30%	27%
Frequency Of Time I Feel I Have To Continue Playing The Games As Long As There Is Money Left:					
Never (0%)	51%	66%	52%	10%	-42%
Rarely (<25%)	16%	13%	20%	14%	----
Occasionally (25% to 50%)	17%	16%	16%	23%	7%
Frequently (50%+)	9%	4%	7%	26%	19%
Almost Always ($\approx 100\%$)	7%	2%	5%	26%	21%

VIDEO LOTTERY PLAY BEHAVIOUR - CONTINUED

TABLE 3.6 (Con'd.)

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Frequency Of Stopping Play Of Video Lottery Games, Over The Last Three Months, Because...					
Spent Budgeted Amount:					
Never (0%)	12%	13%	11%	13%	----
Rarely (<25%)	6%	5%	6%	8%	----
Occasionally (25% to 50%)	10%	9%	8%	16%	8%
Frequently (50%+)	20%	17%	22%	21%	----
Almost Always (≈100%)	52%	56%	52%	42%	-10%
Hit A Certain Credit Level:					
Never (0%)	20%	19%	18%	28%	10%
Rarely (<25%)	9%	8%	9%	12%	----
Occasionally (25% to 50%)	20%	19%	20%	21%	----
Frequently (50%+)	19%	18%	21%	17%	----
Almost Always (≈100%)	32%	35%	32%	22%	-10%
Don't know/Unsure	<1%	<1%	1%	----	----
Run Out Of Credits On The Machine:					
Never (0%)	10%	8%	10%	14%	----
Rarely (<25%)	5%	4%	7%	6%	----
Occasionally (25% to 50%)	15%	13%	17%	16%	----
Frequently (50%+)	21%	20%	22%	22%	----
Almost Always (≈100%)	49%	55%	45%	42%	----
Spent All The Cash Available:					
Never (0%)	52%	65%	54%	15%	-39%
Rarely (<25%)	12%	11%	13%	10%	----
Occasionally (25% to 50%)	6%	6%	6%	9%	----
Frequently (50%+)	10%	6%	7%	26%	19%
Almost Always (≈100%)	20%	13%	19%	39%	20%
Spent Planned Amount Of Time Playing:					
Never (0%)	43%	49%	36%	44%	----
Rarely (<25%)	10%	10%	10%	9%	----
Occasionally (25% to 50%)	15%	13%	17%	15%	----
Frequently (50%+)	15%	11%	19%	17%	----
Almost Always (≈100%)	17%	17%	18%	14%	----
Don't know/Unsure	<1%	----	----	1%	----
Lost Interest In Playing Or Got Bored:					
Never (0%)	40%	38%	36%	53%	17%
Rarely (<25%)	13%	10%	16%	14%	----
Occasionally (25% to 50%)	24%	25%	26%	19%	----
Frequently (50%+)	16%	17%	16%	13%	----

Almost Always ($\approx 100\%$)	7%	10%	6%	2%	----
Don't know/Unsure	<1%	<1%	----	----	----
The Location/Establishment Is Closing:					
Never (0%)	71%	83%	67%	42%	-25%
Rarely (<25%)	13%	10%	16%	16%	----
Occasionally (25% to 50%)	8%	4%	9%	17%	8%
Frequently (50%+)	5%	1%	4%	17%	13%
Almost Always ($\approx 100\%$)	3%	2%	3%	8%	5%

VIDEO LOTTERY PLAY BEHAVIOUR - CONTINUED

TABLE 3.6 (Con'd.)

	Total VLT Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Frequency That They Stop Playing Video Lottery Games, Over The Last Three Months, Because... (Continued)					
To Give Someone Else A Chance To Play:					
Never (0%)	58%	59%	52%	68%	16%
Rarely (<25%)	11%	10%	12%	11%	----
Occasionally (25% to 50%)	22%	21%	27%	13%	-14%
Frequently (50%+)	6%	6%	5%	7%	----
Almost Always (≈100%)	3%	4%	3%	2%	----
To Eat Or Drink:					
Never (0%)	52%	48%	54%	59%	----
Rarely (<25%)	10%	9%	11%	13%	----
Occasionally (25% to 50%)	22%	24%	23%	15%	-8%
Frequently (50%+)	10%	12%	7%	12%	----
Almost Always (≈100%)	5%	7%	5%	2%	----
Friends Or Family Have Arrived Or To Socialize With Friends Or Family:					
Never (0%)	45%	43%	43%	54%	11%
Rarely (<25%)	10%	9%	13%	3%	-10%
Occasionally (25% to 50%)	26%	28%	25%	21%	----
Frequently (50%+)	11%	11%	9%	15%	6%
Almost Always (≈100%)	9%	9%	10%	6%	----
To Play Pool Or Dance:					
Never (0%)	50%	45%	49%	66%	17%
Rarely (<25%)	10%	9%	10%	11%	----
Occasionally (25% to 50%)	23%	29%	21%	10%	-11%
Frequently (50%+)	11%	12%	10%	12%	----
Almost Always (≈100%)	6%	5%	9%	1%	-8%
Friends Or Family Are Leaving:					
Never (0%)	53%	49%	53%	65%	12%
Rarely (<25%)	10%	10%	12%	7%	----
Occasionally (25% to 50%)	21%	24%	21%	14%	-7%
Frequently (50%+)	8%	9%	6%	8%	----
Almost Always (≈100%)	9%	8%	9%	7%	----
In The Last Three Months, Frequency Of Timing My Arrival So I Can Get A Video Lottery Machine:					
Never (0%)	80%	89%	81%	50%	-31%
Rarely (<25%)	10%	7%	11%	17%	----
Occasionally (25% to 50%)	6%	2%	4%	20%	16%
Frequently (50%+)	3%	1%	3%	8%	5%

Almost Always ($\approx 100\%$)	2%	1%	1%	5%	----
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VIDEO LOTTERY PLAY BEHAVIOUR - CONTINUED

TABLE 3.6 (Con'd.)

	Total VLT Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Percent who cash out once they have reached a certain amount of winnings or dollar amount:	91%	89%	94%	90%	----
Average amount cashed out at	\$38.44	\$24.13	\$37.56	\$80.50	\$42.94
Median amount cashed out at	\$25.00	\$20.00	\$20.00	\$50.00	\$30.00
The amount varies when I cash out	1%	1%	1%	1%	----
When I double my money	1%	1%	1%	2%	----
Depends on how much I put in	<1%	1%	----	1%	----
Frequency Of Time I Cash Out That I Then Continue To Play:					
Never (0%)	19%	27%	16%	7%	-9%
Rarely (<25%)	19%	24%	16%	10%	----
Occasionally (25% to 50%)	28%	27%	34%	19%	-15%
Frequently (50%+)	14%	8%	18%	22%	----
Almost Always (≈100%)	11%	4%	10%	32%	22%
Frequency Of Times, In The Last Three Months, That After I Cashed Out I Then Continued To Play:					
Never (0%)	26%	37%	18%	12%	----
Rarely (<25%)	25%	29%	25%	14%	-11%
Occasionally (25% to 50%)	26%	24%	30%	24%	----
Frequently (50%+)	13%	6%	16%	25%	9%
Almost Always (≈100%)	10%	4%	11%	26%	14%

VIDEO LOTTERY GAMBLING OUTCOMES

TABLE 3.7

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Out Of Ten Times You Might Play, The Percent Of Time You Are Up Any Amount Of Money When You Are Done Playing:					
Less than 50% of the time	61%	58%	60%	70%	10%
50% of the time	26%	30%	26%	19%	----
More than 50% of the time	13%	13%	14%	11%	----
Average percentage of time up after finished	37%	38%	39%	31%	-8%
Median percentage of time up after finished	40%	40%	40%	30%	----
Do You Think You Personally Broke Even, Lost A Little, Lost A Lot, Won A Little Or Won A Lot When You Played The Machines In The Last Three Months?					
Lost A Lot	14%	5%	7%	54%	47%
Lost A Little	37%	42%	35%	29%	----
Broke Even	25%	28%	28%	9%	-19%
Won A Little	20%	20%	24%	6%	-18%
Won A Lot	5%	4%	6%	3%	----
For Those Who "Lost":	(n=359)	(n=154)	(n=110)	(n=95)	
Average amount lost over last three months	\$286.56	\$62.31	\$176.54	\$1164.90	\$937.92
Median amount lost over last three months	\$100.00	\$30.00	\$100.00	\$500.00	\$400.00
For Those Who "Won":	(n=170)	(n=79)	(n=81)	▲(n=10)	
Average amount won over last three months	\$599.53	\$202.96	\$651.20	\$1590.00	\$938.80
Median amount won over last three months	\$200.00	\$60.00	\$200.00	\$600.00	\$400.00
	(n=711)	(n=327)	(n=267)	(n=117)	
Average largest amount ever lost	\$115.29	\$39.11	\$79.20	\$410.59	\$331.39
Median largest amount ever lost	\$50.00	\$20.00	\$30.00	\$200.00	\$170.00
Average largest amount ever won	\$339.13	\$211.95	\$358.41	\$650.63	\$292.22
Median largest amount ever won	\$200.00	\$120.00	\$225.00	\$500.00	\$275.00


▲ - due to small sample size, results should be viewed as exploratory.

PLAYER PERCEPTIONS OF PROBLEM BEHAVIOUR

TABLE 3.8

	Total VL Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Spending Too Much Money:					
Those who have ever felt they were spending too much <u>money</u> on video lottery games:	22%	8%	12%	88%	76%
Those who still have a problem spending too much <u>money</u> on video lottery games:	16%	1%	3%	85%	82%
Those who no longer have a problem spending too much <u>money</u> on video lottery games:	6%	7%	9%	3%	----
	(n=160)	△(n=26)	(n=31)	(n=30)	
How long ago (months) they resolved or partially resolved their problem	11.1	13.6	10.3	5.9	4.4
Spending Too Much Time:					
Those who have ever felt they were spending too much <u>time</u> on video lottery games:	19%	5%	9%	79%	70%
Those who still have a problem spending too much <u>time</u> on video lottery games:	14%	1%	4%	79%	75%
Those who no longer have a problem spending too much <u>time</u> on video lottery games:	5%	4%	5%	----	-4%
	(n=69)	△(n=17)	△(n=25)	△(n=27)	
Average months to resolve this issue:	12.1	16.6	8.8	7.2	----
Spending Too Much Time and Money:					
Those who still have a problem spending too much time and/or money on VL games:	17%	2%	3%	91%	88%
Those who no longer have a problem spending too much time and/or money on VL games:	83%	98%	97%	9%	-88%
Level Of Seriousness That Video Lottery Play Is A Problem To Me:					
My video lottery play is a serious problem	4%	----	----	23%	23%
10					
9	<1%	----	----	2%	2%
8	1%	----	----	7%	7%
7	2%	----	<1%	11%	10%
6	1%	----	1%	5%	----
5	6%	2%	2%	27%	25%
4	4%	1%	7%	6%	----
3	9%	7%	12%	9%	----

2	9%	7%	15%	1%	-14%
My video lottery play is not a serious 1 problem at all	63%	83%	62%	9%	-53%
Those who feel that their VL play is a problem: rating 5 - 10	14%	2%	4%	75%	71%
Percent who were ever told that someone else is concerned with how much time or money they were spending on video lottery gaming:	18%	5%	13%	68%	55%

 - due to small sample sizes, results should be viewed as exploratory.

IMPACT OF VL GAMBLING ON DRINKING & SMOKING HABITS

TABLE 3.9.1.1

	Total VL Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Drinking Habits:					
Frequency Of Drinking While Playing VL Games:					
Never (0%)	26%	24%	28%	27%	----
Rarely (<25%)	13%	11%	13%	19%	----
Occasionally (25% to 50%)	22%	23%	22%	19%	----
Frequently (50%+)	16%	19%	14%	14%	----
Almost every time (≈100%)	22%	22%	23%	21%	----
Reasons For Not Drinking While Playing:					
Non-drinker/Don't usually drink at all	19%	18%	22%	17%	----
No specific reason/Just don't drink when I play/ Not in the mood to drink when I'm playing	3%	3%	3%	3%	----
I'm driving	1%	1%	1%	2%	----
Spend more money than I should/than usual	1%	1%	----	3%	----
Rather put money in machine	1%	1%	<1%	1%	----
No alcohol served/illegal locations (e.g. store)	1%	1%	1%	2%	----
Spend more time playing than I should/than usual	<1%	<1%	----	----	----
Don't know when to stop/Keep playing even when I'm losing	<1%	----	<1%	----	----
Other (See verbatim listing)	<1%	<1%	1%	----	----
Impact Of Playing VL Machines On Drinking:					
Drink <u>less</u> than I would if I wasn't playing	24%	18%	24%	36%	12%
Drink the <u>same</u> whether I play or not	52%	59%	49%	37%	-12%
Drink <u>more</u> than I would if I wasn't playing	4%	3%	3%	8%	5%
Non-drinker	19%	18%	22%	17%	----
Don't know/Unsure	1%	<1%	1%	3%	----
Impact Of Losing At VL Gambling On Drinking:					
Drink <u>less</u> than I would if I was winning	8%	6%	5%	24%	19%
Drink the <u>same</u> whether I win or not	2%	69%	65%	43%	-22%
Drink <u>more</u> than I would if I was winning	63%	<1%	2%	5%	----
Never drink while playing	26%	24%	28%	27%	----
Don't know/Unsure	1%	1%	<1%	1%	----
Play VL's when I've had too much too drink:	24%	20%	23%	35%	12%

TABLE 3.9.1.2

	Total VLT Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Percentage who smoke	65%	64%	65%	71%	----
Normally smoke when playing VL games	62%	59%	63%	70%	----
Frequency Of Smoking When Playing Video Lottery Machines:					
Smoke <u>less</u> than I would if I wasn't playing	6%	5%	7%	8%	----
Smoke the <u>same</u> whether I play or not	35%	38%	38%	23%	-15%
Smoke <u>more</u> than I would if I wasn't playing	20%	16%	17%	39%	22%
Percent who do other things while playing VL games (e.g., play pool or darts at the same time)	14%	14%	14%	12%	----

IMPACT OF VL GAMBLING ON BEHAVIOURAL RESPONSE

TABLE 3.9.1.3

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Behavioural Responses While Playing Video Lottery Games:					
Swearing/Cursing:					
Never (0%)	57%	64%	54%	42%	-12%
Rarely (<25%)	14%	13%	15%	16%	----
Occasionally (25% to 50%)	18%	17%	21%	16%	----
Frequently (50%+)	6%	4%	7%	10%	----
Almost Always (≈100%)	4%	2%	3%	15%	12%
Cheering/Yelling Out Loud:					
Never (0%)	62%	67%	63%	49%	-14%
Rarely (<25%)	15%	14%	15%	21%	----
Occasionally (25% to 50%)	19%	18%	17%	22%	----
Frequently (50%+)	3%	1%	4%	6%	----
Almost Always (≈100%)	1%	----	2%	3%	----
Sighing/Groaning:					
Never (0%)	55%	64%	57%	26%	-31%
Rarely (<25%)	14%	11%	19%	14%	----
Occasionally (25% to 50%)	21%	21%	17%	28%	11%
Frequently (50%+)	8%	4%	5%	24%	19%
Almost Always (≈100%)	2%	<1%	2%	9%	7%
Hitting/Kicking Machine:					
Never (0%)	88%	95%	86%	71%	-15%
Rarely (<25%)	6%	3%	5%	15%	10%
Occasionally (25% to 50%)	5%	2%	6%	10%	----
Frequently (50%+)	1%	<1%	1%	3%	----
Almost Always (≈100%)	1%	<1%	2%	1%	----
Talking To The Machine (Encouraging/Threatening):					
Never (0%)	60%	68%	60%	39%	-21%
Rarely (<25%)	10%	9%	12%	12%	----
Occasionally (25% to 50%)	21%	20%	19%	27%	8%
Frequently (50%+)	5%	3%	5%	13%	8%
Almost Always (≈100%)	3%	1%	4%	9%	5%
Other Behavioural Responses:					
Giggling/Laughing	1%	1%	<1%	1%	----
Talk to myself	<1%	----	----	1%	----

IMPACT OF VL GAMBLING ON PHYSIOLOGICAL & EMOTIONAL RESPONSES

TABLE 3.9.1.4

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Physiological Responses While Playing Video Lottery Games:					
Butterflies In Stomach:					
Never (0%)	69%	75%	74%	44%	-30%
Rarely (<25%)	16%	13%	16%	26%	10%
Occasionally (25% to 50%)	11%	11%	9%	14%	----
Frequently (50%+)	3%	1%	1%	14%	13%
Almost Always (≈100%)	1%	<1%	<1%	3%	----
Dry Eyes:					
Never (0%)	80%	85%	84%	54%	-30%
Rarely (<25%)	8%	6%	6%	15%	9%
Occasionally (25% to 50%)	7%	6%	7%	12%	----
Frequently (50%+)	3%	2%	2%	11%	9%
Almost Always (≈100%)	2%	1%	----	9%	9%
Heart Racing/Pounding:					
Never (0%)	72%	79%	79%	38%	-41%
Rarely (<25%)	13%	12%	9%	26%	17%
Occasionally (25% to 50%)	11%	8%	9%	21%	12%
Frequently (50%+)	3%	1%	2%	12%	11%
Almost Always (≈100%)	1%	<1%	----	3%	----
Nausea/Feeling Sick To Stomach:					
Never (0%)	89%	95%	94%	57%	-37%
Rarely (<25%)	6%	3%	3%	20%	17%
Occasionally (25% to 50%)	3%	1%	2%	11%	9%
Frequently (50%+)	2%	<1%	<1%	10%	9%
Almost Always (≈100%)	<1%	<1%	----	2%	----
Headaches:					
Never (0%)	82%	90%	84%	53%	-31%
Rarely (<25%)	8%	5%	8%	17%	9%
Occasionally (25% to 50%)	7%	4%	6%	16%	10%
Frequently (50%+)	3%	1%	1%	10%	9%
Almost Always (≈100%)	1%	<1%	1%	3%	----
Sweaty Hands/Body:					
Never (0%)	81%	87%	88%	48%	-40%
Rarely (<25%)	8%	7%	6%	16%	10%
Occasionally (25% to 50%)	8%	4%	4%	27%	23%
Frequently (50%+)	2%	1%	<1%	7%	6%
Almost Always (≈100%)	1%	<1%	1%	2%	----
Shakes/Tremors/Trembles:					
Never (0%)	95%	98%	97%	82%	-15%

Rarely (<25%)	3%	2%	2%	10%	8%
Occasionally (25% to 50%)	1%	----	1%	6%	5%
Frequently (50%+)	<1%	----	<1%	2%	----
Almost Always (≈100%)	----	----	----	----	----
Other Physical Responses:					
Stiff neck/Back/Arm/Hand	1%	1%	1%	1%	----
Crying	<1%	----	----	1%	----
Relaxed	<1%	----	<1%	----	----
Claustrophobic	<1%	----	----	1%	----
Ears hurt (due to loud noises)	<1%	<1%	----	----	----

IMPACT OF VL GAMBLING ON PHYSIOLOGICAL & EMOTIONAL RESPONSES - CONTINUED

TABLE 3.9.1.4 (Con'd.)

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Emotional Responses While Playing Video Lottery Games:					
Excited/Happy:					
Never (0%)	11%	15%	8%	9%	----
Rarely (<25%)	18%	17%	17%	20%	----
Occasionally (25% to 50%)	57%	56%	61%	48%	-13%
Frequently (50%+)	12%	9%	11%	21%	10%
Almost Always (≈100%)	3%	3%	2%	3%	----
Nervous/Edgy:					
Never (0%)	78%	88%	85%	32%	-53%
Rarely (<25%)	8%	6%	7%	15%	8%
Occasionally (25% to 50%)	11%	6%	6%	39%	33%
Frequently (50%+)	3%	1%	2%	10%	8%
Almost Always (≈100%)	1%	----	----	3%	----
Angry/Frustrated:					
Never (0%)	60%	75%	60%	21%	-39%
Rarely (<25%)	12%	12%	15%	9%	----
Occasionally (25% to 50%)	17%	10%	20%	32%	12%
Frequently (50%+)	7%	3%	4%	26%	22%
Almost Always (≈100%)	3%	1%	1%	13%	12%
Sad/Depressed:					
Never (0%)	78%	90%	85%	30%	-55%
Rarely (<25%)	9%	7%	9%	12%	----
Occasionally (25% to 50%)	7%	2%	4%	28%	24%
Frequently (50%+)	4%	----	1%	21%	20%
Almost Always (≈100%)	2%	<1%	----	9%	9%
Disappointed:					
Never (0%)	37%	47%	37%	9%	-28%
Rarely (<25%)	13%	13%	17%	4%	-13%
Occasionally (25% to 50%)	31%	29%	34%	26%	----

Frequently (50%+)	12%	7%	7%	38%	31%
Almost Always (\approx 100%)	7%	3%	4%	23%	19%
Other Emotional Responses:					
Guilty/Ashamed	<1%	----	----	1%	----
Disgusted with myself	<1%	----	----	2%	----
Surprised (when I win)	<1%	----	----	1%	----

IMPACT OF VL GAMBLING ON PERSON AND OTHERS

TABLE 3.9.2

	Total VLT Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
I Sometimes Get Frustrated When People Tie Up The Machines:					
Agree	14%	6%	12%	44%	32%
Neutral/Unsure	9%	7%	7%	16%	9%
Disagree	77%	87%	81%	40%	41%
I Sometimes Feel Guilty About The Amount Of <u>Money</u> I Spend On VL Games:					
Agree	23%	9%	13%	85%	72%
Neutral/Unsure	12%	8%	18%	8%	-10%
Disagree	65%	82%	70%	8%	-62%
I Sometimes Feel Guilty About how Much <u>Time</u> I Spend Playing VL Games:					
Agree	17%	5%	6%	74%	68%
Neutral/Unsure	6%	3%	9%	7%	----
Disagree	77%	92%	84%	19%	-65%
I Often Spend More <u>Time</u> Playing VL Games Than I Intend To:					
Agree	16%	3%	10%	68%	58%
Neutral/Unsure	13%	9%	15%	15%	----
Disagree	71%	88%	75%	16%	-59%
Sometimes I Am Depressed That I Play VL Games:					
Agree	12%	5%	4%	50%	46%
Neutral/Unsure	8%	3%	8%	21%	13%
Disagree	80%	91%	88%	30%	-58%
I Have Friends Or Family Members Who Worry Or Complain About Me Playing VL Games:					
Agree	13%	4%	6%	55%	49%
Neutral/Unsure	5%	2%	5%	10%	-5%
Disagree	82%	94%	89%	35%	-54%
I Sometimes Spend Money On Video Lottery Games That Was Meant For Some Other Purpose:					
Agree	11%	3%	3%	49%	46%
Neutral/Unsure	6%	4%	5%	15%	10%
Disagree	83%	93%	91%	37%	-54%
I Have Lied About My VL Gambling:					
Agree	9%	1%	3%	48%	45%
Neutral/Unsure	4%	1%	3%	13%	10%
Disagree	87%	98%	95%	39%	-56%
My VL Play Has Put A Strain On My Relationships At Home:					
Agree	7%	1%	1%	38%	37%
Neutral/Unsure	3%	1%	1%	11%	10%
Disagree	90%	98%	98%	50%	-48%

I Sometimes Feel Anxious, Restless Or Irritable Because I Can't Play VL Machines When I Want To:					
Agree	6%	<1%	2%	34%	32%
Neutral/Unsure	3%	<1%	3%	14%	11%
Disagree	90%	99%	96%	52%	-44%
I Spend Time Thinking About VL Play When I'm Not Playing:					
Agree	6%	1%	3%	27%	24%
Neutral/Unsure	4%	2%	2%	17%	15%
Disagree	90%	98%	95%	56%	-39%
I Sometimes Have Trouble Sleeping Thinking About VL Games:					
Agree	4%	----	----	26%	26%
Neutral/Unsure	2%	----	<1%	9%	8%
Disagree	94%	100%	100%	65%	-35%

IMPACT OF VL GAMBLING ON PERSON AND OTHERS - CONTINUED

TABLE 3.9.2 (Con'd.)

	Total VLT Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Percent Who Have A Spouse Or Partner:	70%	69%	73%	68%	----
Frequency of Talking To Spouse/Partner Concerning VL Play:					
Never	48%	53%	46%	40%	----
Rarely	23%	26%	22%	18%	----
Occasionally	17%	13%	21%	18%	----
Frequently	12%	8%	12%	24%	12%
Frequency of Talking To Friends or Acquaintances Concerning VL Play:					
Never	29%	37%	23%	22%	----
Rarely	42%	41%	47%	32%	-15%
Occasionally	23%	19%	24%	32%	8%
Frequently	6%	3%	6%	13%	7%
Percent who ever missed a significant family or personal event because they were playing VL:	7%	2%	3%	34%	31%
Frequency Of Missing Or Being Late For A Family Or Personal Event In The Last Year, Because I Was Playing VL Games:					
Never (0%)	95%	99%	98%	75%	-23%
Rarely (<25%)	3%	1%	1%	13%	12%
Occasionally (25% to 50%)	2%	----	1%	9%	8%
Frequently (50%+)	<1%	----	----	2%	----
Almost Always (≈100%)	<1%	----	----	2%	----
Percent who ever missed work/school because they were playing video lottery machines:	3%	<1%	2%	16%	14%
Frequency Of Missing Or Being Late For Work Or School In The Last Year, Because I Was Playing VL Games:					
Never (0%)	98%	100%	99%	91%	-8%
Rarely (<25%)	1%	<1%	<1%	6%	5%
Occasionally (25% to 50%)	1%	----	<1%	3%	----
Frequently (50%+)	<1%	----	<1%	----	----
Almost Always (≈100%)	<1%	----	----	1%	----

IMPACT OF VL GAMBLING ON PERSON AND OTHERS - CONTINUED

TABLE 3.9.2 (Con'd.)

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Percent who have ever increased their debt in order to pay for their play of VL games	9%	2%	3%	44%	41%
Have <u>Ever</u> Used Money In Order To Play Video Lottery Games From The Following Sources:					
Postponed or did not pay bills (e.g., telephone, other utilities, credit card payments)	7%	1%	2%	35%	32%
Household money (e.g., groceries, incidentals)	6%	1%	2%	28%	26%
Credit cards	5%	1%	1%	27%	26%
Savings	5%	1%	2%	26%	24%
Friends, acquaintances	4%	1%	2%	19%	17%
Family members	4%	----	2%	18%	16%
Bank overdraft/Line of credit	3%	----	<1%	17%	16%
Mortgage payment/Rent	3%	----	1%	15%	14%
Sold personal property	3%	<1%	2%	14%	12%
Have Used Money In Order To Play Video Lottery Games From The Following Sources <u>In</u> The Last Year:					
Postponed or did not pay bills (e.g., telephone, other utilities, credit card payments)	6%	1%	2%	33%	31%
Savings	4%	<1%	1%	23%	22%
Household money (e.g., groceries, incidentals)	4%	<1%	2%	22%	20%
Credit cards	4%	1%	1%	21%	20%
Friends, acquaintances	4%	1%	2%	17%	15%
Family members	3%	----	1%	15%	14%
Bank overdraft/Line of credit	2%	----	<1%	14%	13%
Sold personal property	2%	----	1%	11%	10%
Mortgage payment/Rent	2%	----	<1%	9%	8%
Sometimes had difficulty paying back or replacing money used from these sources	7%	1%	2%	34%	32%

COPING MECHANISMS

TABLE 3.10.1

	Total VL Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Average length of time people felt that VL play has been a problem (months)	4.9	----	----	29.5	29.5
Percent who have ever tried to control the amount of time or money spent playing video lottery machines	9%	----	----	54%	54%
Average number of times they have gone through periods where they made an effort to control their VL play	1.0	----	----	6.0	6.0
Constantly/Several times per day	2%	----	----	10%	10%
Don't know/Unsure	<1%	----	----	1%	----
I Can Give Up Playing VL Games Any Time I Want To:					
Agree	77%	91%	79%	34%	-45%
Neutral/Unsure	8%	4%	10%	16%	6%
Disagree	15%	6%	12%	50%	38%
Most Times I Am In A Place That Has The Machines I Want To Play:					
Agree	26%	11%	26%	65%	39%
Neutral/Unsure	20%	19%	21%	19%	----
Disagree	54%	70%	52%	16%	-36%
I Sometimes Find It Hard To Stop Playing Video Lottery Games, When I Know I Should:					
Agree	18%	4%	9%	75%	66%
Neutral/Unsure	10%	8%	11%	14%	----
Disagree	72%	87%	80%	11%	-69%
Purposely Stopped Or Tried To Stop Playing For An Extended Time Period:					
YES - Stopped Playing	12%	10%	12%	15%	----
YES - Tried to Stop Playing	7%	2%	2%	35%	33%
YES - Stopped/Tried to Stop Playing	6%	1%	3%	26%	23%
NO - Never Stopped/Tried to Stop Playing	75%	87%	83%	24%	59%
Amount Of Times In The Past When You Stopped Or Tried To Stop Playing:					
Once or Twice Ever	8%	5%	8%	19%	11%
Once or Twice Per Year	4%	3%	4%	9%	5%
Once Every Few Months	6%	2%	5%	21%	16%
Once a Month or More	6%	2%	1%	26%	25%
When Did You Last Stop Or Try To Stop Playing?					
On-going	6%	3%	2%	26%	24%

Within the Last Three Months	7%	2%	6%	25%	19%
Within the Last Six Months	5%	3%	6%	11%	5%
Within the Last Year	3%	2%	2%	8%	6%
More than One Year Ago	3%	2%	2%	6%	4%
Those Who Reduced Or Tried To Reduce The Amount Of Time And/Or Money Spent On VL Games:					
YES - Reduced Time and Money Spent	11%	9%	10%	17%	7%
YES - Tried to Reduce Time and Money Spent	7%	1%	3%	29%	23%
YES - Reduced/Tried to Reduce	11%	5%	9%	32%	23%
NO - Never Reduced/Tried to Reduce	72%	85%	78%	21%	-27%
Amount Of Times In The Past When You Reduced Or Tried To Reduce VL Play:					
Once or Twice Ever	7%	6%	8%	10%	----
Once or Twice Per Year	4%	3%	3%	11%	8%
Once Every Few Months	9%	4%	7%	26%	19%
Once a Month or More	8%	2%	5%	32%	25%

COPING MECHANISMS - CONTINUED

TABLE 3.10.1 (Con'd.)

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
When Did You Last Reduce Or Try To Reduce Your VL Play?					
On-going	8%	3%	3%	34%	31%
Within the Last Three Months	11%	6%	9%	30%	21%
Within the Last Six Months	4%	2%	6%	7%	----
Within the Last Year	3%	2%	2%	3%	----
More than One Year Ago	2%	2%	2%	4%	----

COPING MECHANISMS - CONTINUED

TABLE 3.10.2

	Total VLT Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Percent Who Tend To Have A Spending Limit Or Budget When Playing Video Lottery	77%	78%	80%	66%	-14%
Percent who have a spending limit per time	65%	68%	67%	54%	-13%
Percent who have a spending limit per week	8%	4%	12%	9%	----
Percent who have a spending limit per month	4%	7%	1%	3%	----
Frequency Of Exceeding Budget In Past Six Months:					
Never (0%)	26%	37%	24%	3%	-21%
Rarely (<25%)	30%	29%	35%	19%	-16%
Occasionally (25% to 50%)	15%	10%	18%	21%	----
Frequently (50%+)	3%	1%	2%	12%	10%
Almost Always (≈100%)	3%	1%	1%	11%	10%

COPING MECHANISMS - CONTINUED

TABLE 3.10.3

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Strategies Or Actions Used To Keep Spending Under Control (Other Than Spending Limit/Budget):					
None/No other strategies	52%	57%	50%	42%	----
Have no problem and therefore do not need to control spending	22%	25%	25%	4%	-21%
Only bring budgeted amount/small amount of money/No extra money	14%	8%	13%	29%	16%
Leave bank cards/credit cards at home	4%	1%	3%	12%	9%
Willpower (i.e., just get up and leave, do not use bank card)	3%	2%	3%	5%	----
Leave when my VL money is gone/spent budgeted amount/do not exceed my budget	3%	3%	3%	3%	----
Keep VL money separate/in a separate pocket	1%	1%	1%	----	----
Only play with change/coins on hand/from a "Quarter Can"	1%	1%	2%	----	----
Set a time limit/Only play before I must be somewhere else	1%	1%	1%	2%	----
Play at specific credit levels/low credits/small bets	1%	----	1%	2%	----
Stay away from places with machines /Avoid machines	1%	<1%	----	7%	7%
Rely on others - to tell me when to stop, hold VL money/bank card (sister, brother, spouse, friend)	1%	1%	1%	2%	----
Never borrow money/Pay bills first	1%	<1%	<1%	3%	----
Think about my family/bills I must pay	1%	----	<1%	3%	----
Cash-out strategies (cash out as soon as I'm ahead)	1%	1%	1%	3%	----
Eat or drink/Spent money on beer/food	<1%	1%	----	----	----
Participate in other activities	<1%	----	----	1%	----
Spouse/Partner controls all our money	<1%	<1%	----	2%	----
Stay away from Swinging Bell and play Aces Fever, it's a slower game as I take more time making decisions	<1%	<1%	----	----	----

COPING MECHANISMS - CONTINUED

TABLE 3.10.3 (Con'd.)

	Total VLT Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Percent who have strategies to keep spending under control that are <u>usually</u> successful:	14%	15%	14%	14%	----
Strategies Or Actions Used To Keep Spending Under Control That Are <u>Usually</u> Successful:					
None are usually successful	9%	4%	11%	40%	29%
Only bring budgeted amount/small amount of money/No extra money	2%	7%	7%	7%	----
Leave when my VL money is gone/spent budgeted amount/do not exceed my budget	2%	2%	2%	1%	----
Only play with change/coins on hand/from a "Quarter Can"	2%	1%	1%	----	----
Leave bank cards/credit cards at home	1%	1%	2%	3%	----
Keep VL money separate/in a separate pocket	1%	1%	1%	----	----
Eat or drink/Spend money on beer/food	1%	1%	----	----	----
Cash-out strategies (cash out as soon as I'm ahead)	1%	1%	<1%	----	----
Willpower (i.e., just get up and leave, do not use bank card)	<1%	2%	2%	2%	----
Set a time limit/Only play before I must be somewhere else	<1%	1%	<1%	1%	----
Play at specific credit levels/low credits/small bets	<1%	----	----	1%	----
Stay away from places with machines /Avoid machines	<1%	<1%	----	2%	----
Rely on others - to tell me when to stop, hold VL money/bank card (sister, brother, spouse, friend)	<1%	<1%	<1%	1%	----
Never borrow money/Pay bills first	<1%	----	<1%	1%	----
Think about my family/bills I must pay	<1%	----	<1%	----	----
Spouse/Partner controls all our money	<1%	<1%	----	----	----

COPING MECHANISMS - CONTINUED

TABLE 3.10.3 (Con'd.)

	Total VL Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Percent who have strategies to keep spending under control that are <u>sometimes</u> successful:	9%	3%	10%	26%	16%
Strategies Or Actions Used To Keep Spending Under Control That Are <u>Sometimes</u> Successful:					
None are sometimes successful	17%	15%	15%	28%	13%
Only bring budgeted amount/small amount of money/No extra money	5%	1%	6%	16%	10%
Leave bank cards/credit cards at home	2%	<1%	1%	7%	----
Willpower (i.e., just get up and leave, do not use bank card)	1%	1%	2%	1%	----
Rely on others - to tell me when to stop, hold VL money/bank card (sister, brother, spouse, friend)	1%	<1%	1%	----	----
Cash-out strategies (cash out as soon as I'm ahead)	1%	----	1%	3%	----
Leave when my VL money is gone/spent budgeted amount/do not exceed my budget	<1%	<1%	<1%	1%	----
Only play with change/coins on hand/from a "Quarter Can"	<1%	----	1%	----	----
Set a time limit/Only play before I must be somewhere else	<1%	----	<1%	----	----
Play at specific credit levels/low credits/small bets	<1%	----	1%	----	----
Stay away from places with machines /Avoid machines	<1%	----	----	3%	----
Never borrow money/Pay bills first	<1%	----	----	3%	----
Think about my family/bills I must pay	<1%	----	----	1%	----
Spouse/Partner controls all our money	<1%	----	----	1%	----
Stay away from Swinging Bell and play Aces Fever, it's a slower game as I take more time making decisions	<1%	<1%	----	----	----

COPING MECHANISMS - CONTINUED

TABLE 3.10.3 (Con'd.)

	Total VL Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Percent who have strategies to keep spending under control that are <u>usually not successful</u>:	3%	1%	1%	16%	15%
Strategies Or Actions Used To Keep Spending Under Control That Are <u>Usually Not Successful</u>:					
All are at least sometimes successful	24%	18%	24%	38%	14%
Only bring budgeted amount/small amount of money/No extra money	1%	<1%	<1%	6%	5%
Leave when my VL money is gone/spent budgeted amount/do not exceed my budget	<1%	----	----	1%	----
Leave bank cards/credit cards at home	<1%	----	----	2%	----
Willpower (i.e., just get up and leave, do not use bank card)	<1%	----	----	3%	----
Set a time limit/Only play before I must be somewhere else	<1%	----	----	1%	----
Play at specific credit levels/low credits/small bets	<1%	----	<1%	1%	----
Stay away from places with machines /Avoid machines	<1%	----	----	3%	----
Rely on others - to tell me when to stop, hold VL money/bank card (sister, brother, spouse, friend)	<1%	----	----	1%	----
Never borrow money/Pay bills first	<1%	<1%	----	----	----
Think about my family/bills I must pay	<1%	----	----	2%	----
Participate in other activities	<1%	----	----	1%	----
Spouse/Partner controls all our money	<1%	----	----	1%	----

COPING MECHANISMS - CONTINUED

TABLE 3.10.3 (Con'd.)

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Other Strategies Or Actions That VL Players Believe <i>Other People</i> Have That Help Them Keep Their Spending Under Control:					
None/No other strategies	86%	89%	84%	82%	----
Only bring budgeted amount/small amount of money/No extra money	8%	6%	12%	4%	-8%
Leave bank cards/credit cards at home	3%	2%	4%	3%	----
Rely on others - to tell me when to stop, hold VL money/bank card (sister, brother, spouse, friend)	2%	2%	1%	3%	----
Leave when my VL money is gone/spent budgeted amount/do not exceed my budget	1%	<1%	1%	2%	----
Stay away from places with machines /Avoid machines	1%	1%	1%	1%	----
Keep VL money separate/in a separate pocket	<1%	<1%	<1%	----	----
Only play with change/coins on hand/from a "Quarter Can"	<1%	1%	----	----	----
Eat or drink/Spend money on beer/food	<1%	<1%	----	----	----
Set a time limit/Only play before I must be somewhere else	<1%	1%	----	----	----
Play at specific credit levels/low credits/small bets	<1%	----	<1%	----	----
Never borrow money/Pay bills first	<1%	----	----	1%	----
Play two people to one machine (i.e., split wins/loses)	<1%	<1%	----	----	----
Cash-out strategies (cash out as soon as I'm ahead)	<1%	----	----	3%	----
Quit playing altogether	1%	<1%	1%	3%	----
Go to Gamblers Anonymous	<1%	----	----	1%	----
Play other games of chance instead (e.g., Bingo)	<1%	----	----	1%	----
Spouse/partner controls money	<1%	<1%	<1%	1%	----

COPING MECHANISMS - CONTINUED

TABLE 3.10.4

	Total VLT Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Percentage of Players Who Have Partially/ Completely Resolved Their Problem With VL Gambling:	14%	9%	14%	29%	15%
Ways People Got Their Video Lottery Spending Under Control (If Problem Is Partially/Completely Resolved):					
Budgeted money/Only brought budgeted amount/ small amount of money	4%	2%	4%	6%	----
Quit playing altogether	3%	2%	3%	3%	----
Budgeted time/Reduced time spent playing/Cut back number of hours spent playing	3%	----	2%	2%	----
Spouse/partner controls all our money (i.e., pay cheque goes into wife's bank account)	3%	----	----	1%	----
Reduced frequency of play (i.e., twice per week instead of 10 times, only on weekends)	1%	2%	2%	8%	6%
Willpower (i.e., just get up and leave, stopped using bank card, still go to bars but do not play machines)	1%	2%	3%	6%	----
Participating in other activities	1%	<1%	1%	1%	----
Left bank cards/credit cards at home	1%	<1%	<1%	1%	----
Play other games of chance instead (e.g., Bingo, cards)	1%	<1%	----	----	----
Staying away from places with machines/Avoiding machines	< 1%	1%	1%	5%	----
Stopped borrowing money/Pay bills first	< 1%	<1%	1%	3%	----
Left when my VL money was gone/spent budgeted amount/Stopped exceeding my budget	< 1%	1%	<1%	1%	----
Help/Support from others - to tell me when to stop, hold VL money/bank card	< 1%	----	----	1%	----
Eat or drink more/Spent more money on beer/food instead	< 1%	----	----	1%	----
Thinking about/seeing problems caused by VL play (self and others)	< 1%	----	1%	----	----
Discussions/talk with spouse/partner	< 1%	<1%	----	----	----
Prayer/Religion	< 1%	<1%	----	----	----

COPING MECHANISMS - CONTINUED

TABLE 3.10.4 (Con'd.)

	Total VLT Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Percentage of Players Who Have Partially/ Completely Resolved Their Problem With VL Gambling:	14%	9%	14%	29%	15%
Ways People Tried To Get Their Video Lottery Spending/Play Under Control That Were Unsuccessful In The Long Run (If Problem Is Partially/Completely Resolved):					
No/None	12%	8%	12%	21%	9%
Left when my VL money was gone/spent budgeted amount/Stopped exceeding my budget	1%	----	1%	2%	----
Left bank cards/credit cards at home	<1%	----	----	2%	----
Budgeted money/Only brought budgeted amount/ small amount of money	<1%	----	1%	1%	----
Willpower (i.e., just get up and leave, stopped using bank card, still go to bars but do not play machines)	<1%	<1%	----	1%	----
Staying away from places with machines/Avoiding machines	<1%	<1%	----	1%	----
Stopped borrowing money/Pay bills first	<1%	----	----	1%	----
Participating in other activities	<1%	----	----	1%	----
Reduced frequency of play (i.e., twice per week instead of 10 times, only on weekends)	<1%	----	1%	----	----
Thinking about/seeing problems caused by VL play (self and others)	<1%	----	<1%	----	----
Prayer/Religion	<1%	<1%	----	----	----

COPING MECHANISMS - CONTINUED**TABLE 3.10.4 (Con'd.)**

	Total VLT Players (n=711)	Infrequent Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Percentage Of Players For Whom VL Gambling Is Still A Problem:	11%	----	----	65%	65%
Ways People Have Tried To Get Their Spending Under Control That Were Relatively Successful In The Long Run (If VL Gambling Is Still A Problem):					
No/None	2%	----	----	13%	13%
Budgeted money/Only brought budgeted amount/ small amount of money	2%	----	----	12%	12%
Staying away from places with machines/Avoiding machines	2%	----	----	11%	11%
Left bank cards/credit cards at home	1%	----	----	4%	----
Participating in other activities	1%	----	----	4%	----
Budgeted time/Reduced time spent playing/Cut back number of hours spent playing	<1%	----	----	3%	----
Stopped borrowing money/Pay bills first	<1%	----	----	3%	----
Discussions/talk with spouse/partner	<1%	----	----	3%	----
Willpower (i.e., just get up and leave, stopped using bank card, still go to bars but do not play machines)	<1%	----	----	2%	----
Reduced frequency of play (i.e., twice per week instead of 10 times, only on weekends)	<1%	----	----	2%	----
Quit playing altogether	<1%	----	----	2%	----
Help/Support from others - to tell me when to stop, hold VL money/bank card	<1%	----	----	1%	----
Left when my VL money was gone/spent budgeted amount/Stopped exceeding my budget	<1%	----	----	1%	----
Kept VL money separate/in a separate pocket	<1%	----	----	1%	----
Only played with change (coins on hand/from a 'Quarter Can')	<1%	----	----	1%	----
Prayer/Religion	<1%	----	----	1%	----
Went to Gamblers Anonymous/Got professional help	<1%	----	----	1%	----
Spouse/partner controls all our money (i.e., pay cheque goes into wife's bank account)	<1%	----	----	1%	----

COPING MECHANISMS - CONTINUED**TABLE 3.10.4 (Con'd.)**

	Total VLT Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Percentage Of Players For Whom VL Gambling Is Still A Problem:	11%	----	----	65%	65%
Ways People Have Tried To Get Their Spending Under Control That Were Relatively Unsuccessful In The Long Run (If VL Gambling Is Still A Problem):					
No/None	3%	----	----	18%	18%
Budgeted money/Only brought budgeted amount/ small amount of money	2%	----	----	9%	9%
Willpower (i.e., just get up and leave, still go to bars but do not play machines)	1%	----	----	6%	6%
Staying away from places with machines/Avoiding machines	1%	----	----	6%	6%
Left bank cards/credit cards at home	1%	----	----	5%	----
Quit playing altogether	<1%	----	----	3%	----
Left when my VL money was gone/spent budgeted amount/Stopped exceeding my budget	<1%	----	----	2%	----
Budgeted time/Reduced time spent playing/Cut back number of hours spent playing	<1%	----	----	2%	----
Participating in other activities	<1%	----	----	2%	----
Kept VL money	<1%	----	----	1%	----
Reduced frequency of play (i.e., twice per week instead of 10 times, only on weekends)	<1%	----	----	1%	----
Help/Support from others - to tell me when to stop, hold VL money/bank card	<1%	----	----	1%	----
Thinking about/seeing problems caused by VL play (self and others)	<1%	----	----	1%	----
Went to Gamblers Anonymous/Got Professional help	<1%	----	----	1%	----
Don't know/Unsure	<1%	----	----	3%	----

COPING MECHANISMS - CONTINUED

TABLE 3.10.5

	Total VLT Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Those Who Went To Any Of The Following Sources For Help Or Information On Controlling Your VL Play:					
Spouse/Partner	3%	1%	1%	17%	16%
Other family members, household	2%	----	<1%	10%	9%
Employer/Colleagues	1%	----	----	3%	----
Friends	2%	<1%	<1%	12%	11%
Church/Religious groups	<1%	<1%	----	2%	----
Family doctor, therapist	1%	----	----	8%	----
Gambling self-help group/Gamblers Anonymous	1%	----	----	9%	----
Drug Dependency Services/Detox	1%	----	----	5%	----
Gambling helpline	1%	----	----	5%	----
Community center/Counselor	1%	----	----	3%	----
Other (See verbatim listing)	<1%	----	----	1%	----
None of the above/No one	94%	99%	99%	71%	-28%
Without Your Request, Sources That Have Volunteered Or Tried To Provide You With Information And/or Help On Controlling Your Video Lottery Play:					
Spouse/Partner	1%	----	<1%	7%	8%
Other family members, household	1%	1%	1%	4%	----
Employer/Colleagues	<1%	----	<1%	1%	----
Friends	2%	1%	<1%	8%	7%
Church/Religious groups	----	----	----	----	----
Family doctor, therapist	<1%	----	----	1%	----
Gambling self-help group/Gamblers Anonymous	<1%	----	----	3%	----
Drug Dependency Services/Detox	<1%	----	----	1%	----
Gambling helpline	<1%	----	----	2%	----
Community center/Counselor	<1%	----	----	1%	----
Other (See verbatim listing)	<1%	<1%	<1%	1%	----
None of the above/No one	96%	98%	99%	84%	-15%
Those Who Have Ever Sought Information Or Help From Any Of The Following Sources To Help Someone Else Control Their Video Lottery Play:					
Spouse/Partner	1%	1%	1%	1%	----
Other family members, household	<1%	1%	----	----	----
Employer/Colleagues	<1%	----	<1%	----	----
Friends	2%	2%	2%	2%	----
Church/Religious groups	----	----	----	----	----
Family doctor, therapist	<1%	----	<1%	----	----
Gambling self-help group/Gamblers Anonymous	1%	1%	1%	1%	----

Drug Dependency Services/Detox	<1%	----	<1%	----	----
Gambling helpline	<1%	1%	<1%	----	----
Community center/Counselor	<1%	----	----	2%	----
Other (See verbatim listing)	<1%	----	<1%	----	----
None of the above/No one	96%	97%	96%	95%	----

COPING MECHANISMS - CONTINUED

TABLE 3.10.6

	Total VL Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Rating of Helpfulness For...					
Spouse/Partner:					
Helpful	2%	1%	1%	9%	8%
Neutral/Unsure	1%	----	1%	4%	----
Not Helpful	2%	<1%	<1%	8%	7%
Other Family Members, Household:					
Helpful	1%	<1%	<1%	4%	----
Neutral/Unsure	1%	<1%	<1%	2%	----
Not Helpful	2%	1%	<1%	7%	6%
Employer/Colleagues:					
Helpful	----	----	----	----	----
Neutral/Unsure	----	----	----	----	----
Not Helpful	1%	----	1%	4%	----
Friends:					
Helpful	2%	1%	<1%	5%	----
Neutral/Unsure	1%	1%	<1%	5%	----
Not Helpful	1%	1%	1%	3%	----
Church/Religious Groups:					
Helpful	<1%	<1%	----	2%	----
Neutral/Unsure	----	----	----	----	----
Not Helpful	----	----	----	----	----
Family Doctor, Therapist:					
Helpful	1%	----	----	3%	----
Neutral/Unsure	<1%	----	<1%	1%	----
Not Helpful	1%	----	----	3%	----
Gambling Self-Help Group/Gamblers Anonymous:					
Helpful	<1%	----	----	1%	----
Neutral/Unsure	1%	<1%	<1%	3%	----
Not Helpful	1%	<1%	1%	5%	----
Drug Dependency Services/Detox:					
Helpful	1%	----	<1%	3%	----
Neutral/Unsure	<1%	----	----	1%	----
Not Helpful	<1%	----	----	2%	----
Gambling Helpline:					
Helpful	1%	----	----	3%	----
Neutral/Unsure	<1%	1%	----	----	----
Not Helpful	1%	----	<1%	3%	----
Community Center/Counselor:					
Helpful	<1%	----	----	2%	----
Neutral/Unsure	<1%	----	----	3%	----

Not Helpful	----	----	----	----	----
Other (See Verbatim Listing):					
Helpful	<1%	----	<1%	----	----
Neutral/Unsure	----	----	----	----	----
Not Helpful	<1%	<1%	<1%	1%	----

COPING MECHANISMS - CONTINUED

TABLE 3.10.6 (Con'd.)

	Total VL Players (n=711)	Infrequen t Players (n=327)	Frequent Players (n=267)	Problem Players (n=117)	Difference (Frequent vs. Problem)
Percent Of Regular VL Players:	100%	46%	38%	16%	
Help For Self Or Help From Others That Were Successful In The Long Run:					
Nothing/None were successful	3%	1%	1%	15%	14%
Moral support/Discussions/Advice	2%	<1%	1%	12%	11%
Spouse/partner controlling our money	1%	<1%	----	4%	----
Invitations to/Participation in activities other than gambling	<1%	<1%	----	1%	----
Pamphlets/Printed material	<1%	----	<1%	----	----
Quit playing together (spouse, friend)	<1%	----	<1%	----	----
Meetings (Gamblers Anonymous)	<1%	----	----	2%	----
Monitoring of play/Phone calls to location(s)	<1%	----	----	2%	----
Nagging/Lots of questions	<1%	<1%	----	----	----
Threats	<1%	----	----	1%	----
Other (See verbatim listing)	<1%	----	----	1%	----
Help For Self Or Help From Others That Were Unsuccessful In The Long Run:					
Nothing/None were successful	2%	1%	1%	10%	9%
Moral support/Discussions/Advice	3%	1%	<1%	15%	14%
Nagging/Lots of questions	1%	1%	----	3%	----
Pamphlets/Printed material	<1%	<1%	----	2%	----
Quit playing together (spouse, friend)	<1%	----	<1%	2%	----
Meetings (Gamblers Anonymous)	<1%	----	----	3%	----
Threats	<1%	----	<1%	1%	----
“Stickers” on VL machines	<1%	----	----	2%	----
Don't know/Unsure	<1%	----	1%	1%	----
Those who believe that having brochures or flyers explaining methods of controlling video lottery expenditures at the video lottery locations would be helpful:	15%	11%	9%	40%	31%

APPENDIX E

**Open-Ended Coding,
Coding & Verbatim Listings**

CODING

Q8b. What types of situations would this be? (Where you spend too much time or money playing VL games)

CODE	DESCRIPTION
01	When I'm winning/When I'm ahead/Feeling lucky
02	Working hours - after work, before work, during breaks at work, between shifts
03	Days off work - weekends, vacation days, when I'm laid off
04	When drinking/Drinking too much
05	When I'm bored/Killing time/Have extra time
06	When I'm short of money/Need money/Chasing losses/Losing
07	When I'm out in a bar - dancing, playing pool
08	When I travel
09	When I go to play by myself/Play alone
10	When I play to escape problems/Fighting at home
11	On payday
12	When I have extra cash/Bank card with me
13	When I'm upset/Depressed/Frustrated
30	Other

VERBATIMS

Q8b. What types of situations would this be? (Where you spend too much time or money playing VL games)

CODE 01 - WHEN I'M WINNING/WHEN I'M AHEAD/FEELING LUCKY

- Just one - when I'm winning I get excited and may spend more time;
- If I am winning, I stay longer;
- I play more after I've won;
- When you win - you think you'll win more.

CODE 02 - WORKING HOURS - AFTER WORK, BEFORE WORK, DURING BREAKS AT WORK, BETWEEN SHIFTS

- On the way home from work, instead of going home, I play VLT for more than an hour, then it leads to two;
- Right before work, on breaks at work;
- During a split shift (work), I have to kill time.

CODE 03 - DAYS OFF WORK - WEEKENDS, VACATION DAYS, WHEN I'M LAID OFF

- If I'm not working then I play more often, like when I'm laid off;
- Whenever I get a day off work I save all my tips and go right to the machines.

CODE 04 - WHEN DRINKING/DRINKING TOO MUCH

- When I'm drinking too much I spend too much money in the machines;
- Drinking at the tavern;
- Well, if we go out drinking;
- When I drink too much;
- When I have a few more beers than I should

CODE 05 - WHEN I'M BORED/KILLING TIME/HAVE EXTRA TIME

- When I'm bored;
- When I've got too much time on my hands I play.

VERBATIMS

Q8b. What types of situations would this be? (Where you spend too much time or money playing VL games) - Continued

CODE 06 - WHEN I'M SHORT OF MONEY/NEED MONEY/CHASING LOSSES

- During economically stressful times - that's it;
- When I had to get back money I have lost;
- When I'm having a bad night and I'm not winning;
- Put more money in to get some back, but that doesn't work;
- I get in and start playing and I have \$1.00 in there then I try to win it back and spend \$100 more;
- When I'm broke I try to win money just to have some. If I take my last twenty bucks I might win and have money for other stuff for the rest of the month;
- When I lose I keep spending more and betting higher and just keep losing.

CODE 07 - WHEN I'M OUT IN A BAR - DANCING, PLAYING POOL

- Well, if we go out dancing (or drinking);
- When I go to the legion, I can't afford to go more than once a week but I do sometimes;
- Friday night for socializing, I go out and maybe spend too much money

CODE 08 - WHEN I TRAVEL

- I would have to say that during travel, when in bars.

CODE 09 - WHEN I GO TO PLAY BY MYSELF/PLAY ALONE

- Probably those times that I go out by myself determined to spend a limited amount of money, I always spend more.

CODE 10 - WHEN I PLAY TO ESCAPE PROBLEMS/FIGHTING AT HOME

- If I get upset at home and I want to get out of the house that's when I want to go and play;
- Just when I feel pressured at home - I will go on a binge, I would just get out of the house and play.

CODE 11 - ON PAYDAY

Payday - once a month, I get carried away.

VERBATIMS

Q8b. What types of situations would this be? (Where you spend too much time or money playing VL games) - Continued

CODE 12 - WHEN I HAVE EXTRA CASH/BANK CARD WITH ME

- If I'm carrying any money in my pocket and same with bank cards - if I have it on me, I want to spend it on the machines;
- When there is money in my pocket. I shouldn't spend more money but I do;
- When I went to the bank and realized I don't have any money left in my account, I used to bring my bank card when I played and any time I ran out of money I would go get more.

CODE 13 - WHEN I'M UPSET/DEPRESSED/FRUSTRATED

- I don't play when I'm upset anymore because I get drunk and spend too much money and blow all the money;
- My state of mind, like when I'm feeling depressed (I don't want to get into that);
- When I get frustrated;
- When I have bad nerves or I'm upset;
- Under stress;
- I get depressed because of my son who hasn't spoken to me in 7 years and then I play to take my mind off it, I'm careless then and spend too much money;
- When I'm upset, to occupy my mind from stress.

CODE 30 - OTHER

- Really nice days. It seems that on sunny beautiful days I tend to play these stupid machines. I should be outside enjoying myself but for some reason I tend to play the machines on sunny days and lose track of my time;
- When I'm at the native gambling place I spend more time;
- When you are in front of them, I want to put more and more money in them.

CODING

Q11. During the past three months, which video lottery games have you played on a regular basis?

CODE	DESCRIPTION
	<u>LINE GAMES</u>
01	Swinging Bells
02	Lucky 7
03	Lucky 8 Line
04	Red Hot 7's
05	Lotto 5 Line
	<u>CARD GAMES</u>
10	Aces Fever
11	Poker (Joker Poker, Fever Poker, etc.), Double-Up Poker
12	Blackjack
	<u>OTHERS</u>
20	Keno (Bonus Keno, Keno Wild, Classic Keno, etc.)

SUMMARY TABLE

Q12b & Q12c. Is there a time of day during the week/weekend that you often play the games?
CODE 8 - OTHER

DESCRIPTION	TOTAL
5:00 a.m.	1

CODING

Q15. In the past month, on average, how long did you tend to play video lottery games each time you played? (CODES FOR NON-NUMERIC ANSWERS)

CODE	DESCRIPTION
01	Varied/Depends on how well I did

CODING
Q21. Why do you play video lottery games?

CODE	DESCRIPTION
01	Fun/Entertainment/Enjoyment
02	To win money/Chance to win
03	Relaxation/Distracton/Get away from problems
04	Fill time/Something to do
05	I'm addicted/Compulsive gambler/Urges to play
06	To socialize (with other players, friends, family)/Get out of the house
07	Play on impulse/when I see them/on a whim/Because they're there
08	For the challenge/To gamble
09	Drawn to them/Fascinating/Mesmerizing
10	A habit/Just something I do
11	Adrenaline rush/Get a high
20	Other
99	Don't know/Unsure

VERBATIMS

Q21. Why do you play video lottery games?
CODE 01 - FUN/ENTERTAINMENT/ENJOYMENT

- For entertainment;
- They're fun, I enjoy them - I see no harm if played in moderation;
- Mostly just because it's fun;
- I just like to play;
- I like (real) poker;
- For entertainment, as long as you don't get into it;
- I enjoy playing them;
- I like to play \$10.00 as entertainment;
- I'd say it's a form of entertainment - it's like shooting a game of pool when there's no one there to play with - Interactive TV;
- Something different besides shooting pool;
- I just like it, I don't drink or smoke so playing video lottery is my entertainment - I like the sound and like the excitement and like watching to see if I have won;
- I enjoy them - it's a video game I can win money from - I like that fact because I enjoy video games;
- It's a form of entertainment - I play before darts each week.

CODE 02 - TO WIN MONEY/CHANCE TO WIN

- To try and win money;
- I want to win;
- I like a chance to win - it's like 6/49 except it's instantaneous;
- To make money;
- To see if I can win big;
- I want to win some money - trying to hit that jackpot;
- Because I might win;
- Because I have the chance to win;
- To win - I don't really like the game, just to win;
- Trying to make some money, I'm hoping that I will win;
- They pay better than the casinos;
- I play to win--I know it's computerized and has nothing to do with skill, but I play because I might get lucky

VERBATIMS

Q21. Why do you play video lottery games? - Continued

CODE 03 - RELAXATION/DISTRACTION/GET AWAY FROM PROBLEMS
<ul style="list-style-type: none"> • I like to get away - I don't think while I am playing; • Relaxation--to get away from my kids; • Relief from stress--relaxes me; • Relaxing--forget my worries; • To bring my stress level down; • It's an escape.

CODE 04 - FILL TIME/SOMETHING TO DO
<ul style="list-style-type: none"> • To waste time; • Boredom; • It's something to do for the evening; • It passes time away; • Boredom, nothing else to do; • Something to do, something to waste my money on; • Just something while I'm waiting for my dinner, I guess; • Pass the time - that's it, just to kill some time; • Usually because I'm bored, just hanging around, no one to talk to; • To wait for someone to show up or waiting to play pool; • Just to pass time at work. They're in my work; • Pastime--when I quit smoking I use that money to play VL instead; • To pass time when I'm at a bar; • Just to wait for food to be done; • Kill time waiting for bowling alleys; • Most times when I'm hanging around waiting for friends for lunch, I play because I'm bored waiting.

VERBATIMS
Q21. Why do you play video lottery games? - Continued
CODE 05 - I'M ADDICTED/COMPULSIVE GAMBLER/URGES TO PLAY

- Because, I don't know, I'm addicted I guess;
- (Because they are there), a touch of compulsive gambling;
- I get the urge to play them. I constantly think of playing them. I play so I can forget about it, so I can forget about my urge;
- Addiction - I think it's addiction;
- I play because I feel they're addictive, it's almost like a compulsion;
- I just think I'm really addicted;
- You get addicted to them. They (the machines) get in your system;
- I can't stop playing. When I'm in a place where they are, I play even though I don't want to;
- Addicted to them. Can't stay away. I don't want to play them but I do and spend all my money every week on them;
- I've got a funny feeling I'm addicted.

CODE 06 - TO SOCIALIZE (WITH OTHER PLAYERS, FRIENDS, FAMILY)

- It's a social thing - I know people there who play VLT or go to work there;
- I go out with buddies and play;
- I go out for an hour to socialize with my sister - saves me from getting cabin fever;
- One of my friends will be playing and if there is a machine available, I will play it (until he's finished);
- Because someone I know is playing so I'll play and chat;
- It's an evening out;
- Because my husband plays--I started playing because he goes so I go with him--to be with my husband.

CODE 07 - PLAY ON IMPULSE/WHEN I SEE THEM/ON A WHIM/BECAUSE THEY'RE THERE

- I play on a whim and don't really have that much interest in the VLT's overall;
- Because they are there.

VERBATIMS
Q21. Why do you play video lottery games? - Continued
CODE 08 - FOR THE CHALLENGE/TO GAMBLE

- It's a challenge to sink \$50 and get back \$100, double your money;
- To gamble and try my luck;
- I play VLT games to gamble, for the challenge;
- Take chances, looking for that rainbow that never appears;
- I like to gamble - I go to play in a crib tournament so I stick some money in the machine;
- I like gambling;
- The thrill of gambling;
- I enjoy the suspense, if I'm going to lose my money or double it;
- I like games of chance--I'm a gambler.

CODE 09 - DRAWN TO THEM/FASCINATING/MESMERIZING

- I'm fascinated by them - the colours and sounds draw me to them;
- Once you get on the, you could never stop - thinking, 'this machine cannot beat me'. No brains - you are one with the machine;
- It amazes me to see what's coming--it fascinates me--I want to see what's going to come next or how many 7's I can get--I just like to watch it, I love it;
- The colours of the game are so attractive--I like the colours, they attract me.

CODE 10 - A HABIT/JUST SOMETHING I DO

- It's a habit, I guess;
- It's habitual, it's something that I do.

CODE 11 - ADRENALINE RUSH/GET A HIGH

- I get an adrenaline rush;
- I get a psychological rush every time I win;
- Instant rush for 5 minutes;
- The thrill of it--interesting feeling it gives you even when you lose. It's hard to explain.

CODE 20 - OTHER

- Doesn't take that long;
- On my route--it's convenient;
- (To get out of the house) I live on the reservation and they have four locations to play;
- It's something I can do alone.

CODING

Q24a. What other strategies or actions do you use to keep your spending under control each time you play?

Q24a - Q24c. How successful are these strategies in keeping your spending under control each time? Would you say usually successful, sometimes successful or not usually successful?

CODE	DESCRIPTION
00	None/No other strategies
01	Have no problem and therefore do not need to control spending
02	Only bring budgeted amount/small amount of money/No extra money
03	Leave when my VL money is gone/spent budgeted amount/Do not exceed my budget
04	Leave bank cards/credit cards at home
05	Keep VL money separate/in a separate pocket
06	Only play with change/coins on hand/from a "Quarter Can"
07	Willpower (i.e., just get up and leave, do not use bank card)
08	Eat or drink/Spend money on beer/food
09	Set a time limit/Only go to play before I must be somewhere else
10	Play at specific credit levels/low credits/small bets
11	Stay away from places with machines/Avoid machines
12	Rely on others - to tell me when to stop, hold VL money/bank card (sister, brother, spouse, friend)
13	Never borrow money/Pay bills first
14	Think about my family/Bills I must pay
20	Cash-out strategies (cash out as soon as I'm ahead)
24	Participate in other activities
25	Spouse/Partner controls all our money
40	Other

VERBATIMS

Q24a. What other strategies or actions do you use to keep your spending under control each time you play?

Q24a - Q24c. How successful are these strategies in keeping your spending under control each time? Would you say usually successful, sometimes successful or not usually successful?

<p>CODE 02 - ONLY BRING BUDGETED AMOUNT/SMALL AMOUNT OF MONEY/NO EXTRA MONEY</p>

- | |
|--|
| <ul style="list-style-type: none"> • Don't take extra money besides budgeted amount; • Don't take any more money with me; • I only bring \$10 with me when I go; • I just take a specified amount with me; • I just don't take much money with me; • Leave my other money home; • Only take what I intend to play with at that time; • I don't take any extra money so I only have my budgeted \$10 - unless I win the card tournament, then I have more but that doesn't happen too often; • I take my budgeted amount with me, no more; • I only take a certain amount of money with me; • I usually only take a set amount with me to play but it varies - depends on who I go with and how long I'm going to be there; • Hide my money, i.e., leave my purse in the car. |
|--|

<p>CODE 03 - LEAVE WHEN MY VL MONEY IS GONE/SPENT BUDGETED AMOUNT/DO NOT EXCEED MY BUDGET</p>
--

- | |
|---|
| <ul style="list-style-type: none"> • Leave when my money is gone; • Just spend what I'm going to and nothing else - don't spend any more; • When my pocket is empty, I quit; • I also now have an allowance for the month and once my money is gone, it's gone; • I may take more money, but only X dollars for VLT and that's what I spend; • I get 5 bucks and when I've had my beer, I stick a few loonies in and when it's gone, I'm gone; • Make a limit and keep it; • Just allot X dollars for that time (and not spend any more). |
|---|

<p>CODE 04 - LEAVE BANK CARDS/CREDIT CARDS AT HOME</p>

- | |
|---|
| <ul style="list-style-type: none"> • Usually don't take bank book - give it to a friend, only take extra cash; • Just take cash, no cards - leave cards at home; • Don't have a cash card. |
|---|

VERBATIMS

Q24a. What other strategies or actions do you use to keep your spending under control each time you play?

Q24a - Q24c. How successful are these strategies in keeping your spending under control each time? Would you say usually successful, sometimes successful or not usually successful?

CODE 05 - KEEP VL MONEY SEPARATE/IN A SEPARATE POCKET

- Separate VL money into another pocket - I'm a nut, I'm a "practical pig";
- Keep money in one pocket only;
- I keep my money for VL play in a different pocket (and when it's gone, that's it);
- Front right pocket--whatever's in there goes into the machines--other money in left pocket.

CODE 06 - ONLY PLAY WITH CHANGE/COINS ON HAND/FROM A "QUARTER CAN"

- I don't spend all of my money, I only spend the change I have in my pocket;
- I just use my pocket change;
- I don't break bills--only use the change in my pocket.

CODE 07 - WILLPOWER (I.E., JUST GET UP AND LEAVE, DO NOT USE BANK CARD)

- Use willpower;
- Just get up and leave the machine;
- My golden rule - I will not go to the bank machine to get more money!
- My conscience keeps me from overspending;
- Tell myself to leave;
- I sit down and think I will not win;
- "Self discipline" I just allow myself to spend a certain amount of money out of my pocket;
- (Stop playing) go dancing.

CODE 08 - EAT OR DRINK/SPEND MONEY ON BEER/FOOD

- Buy more beer and more food.

CODE 09 - SET A TIME LIMIT/ONLY GO TO PLAY BEFORE I MUST BE SOMEWHERE ELSE

- Go when I can't play for long because I have to be somewhere else;
- Time limits - have an hour, then I have to leave to be some place - Got to go.

VERBATIMS

Q24a. What other strategies or actions do you use to keep your spending under control each time you play?

Q24a - Q24c. How successful are these strategies in keeping your spending under control each time? Would you say usually successful, sometimes successful or not usually successful?

CODE 10 - PLAY AT SPECIFIC CREDIT LEVELS/LOW CREDITS/SMALL BETS

- Keep changing the bet - this helps keep my spending under control to go back and forth from 8 to 16 credits;
- Bet low or I bet reasonably;
- Keep a low bet, putting \$5 in - I just don't bet high;
- I'll bet low and let it ride automatically, then I'd not spend any more or stop the machines--takes less money and I play for longer.

CODE 11 - STAY AWAY FROM PLACES WITH MACHINES/AVOID MACHINES

- Just try to stay away from them;
- Try to get new hobbies to stay away from the machines.

CODE 12 - RELY ON OTHERS - TO TELL ME WHEN TO STOP, HOLD VL MONEY/BANK CARD (SISTER, BROTHER, SPOUSE, FRIEND)

- My sister tells me to give it up and not to spend more money, so I don't;
- Girlfriend controls it--she handles all the money. She only lets me have so much money at one time.

CODE 13 - NEVER BORROW MONEY/PAY BILLS FIRST

- (Only bring \$10 with me when I go) and never borrow money from anyone;
- Do shopping first to get what I need and then play;
- Pay my bills first then play with leftover money;
- Pay bills first--what's left over, I decide how much I will spend of it (budget).

CODE 14 - THINK ABOUT MY FAMILY/BILLS I MUST PAY

- I have a family and I keep that on my mind at all times;
- I think about all my bills.

VERBATIMS

Q24a. What other strategies or actions do you use to keep your spending under control each time you play?

Q24a - Q24c. How successful are these strategies in keeping your spending under control each time? Would you say usually successful, sometimes successful or not usually successful?

CODE 20 - CASH-OUT STRATEGIES (CASH OUT AS SOON AS I'M AHEAD)
--

- | |
|---|
| <ul style="list-style-type: none"> • Cash out at \$20.00 and then spend my winnings instead of the money I had to spend; • Get up to a certain credit level then quit while ahead and take it out; • I put \$2.00 in, when I get to \$10.00 I cash out then put \$2.00 in and cash out again once I've reached a certain amount. |
|---|

CODE 24 - PARTICIPATE IN OTHER ACTIVITIES
--

- | |
|---|
| <ul style="list-style-type: none"> • Plan to go play pool and get out the door before you decide to spend \$20.00. |
|---|

CODE 25 - SPOUSE/PARTNER CONTROLS ALL OUR MONEY
--

- | |
|--|
| <ul style="list-style-type: none"> • I give my paycheck to my wife. |
|--|

CODE 40 - OTHER

- | |
|--|
| <ul style="list-style-type: none"> • I try to stay away from Swinging Bells and play Aces Fever, it's a slower game as I take more time making decisions. |
|--|

CODING

Q24c. Do you know of any strategies or actions that other people have to help keep their spending under control each time?

CODE	DESCRIPTION
00	None/No other strategies
02	Only bring budgeted amount/small amount of money/No extra money
03	Leave when VL money is gone/spent budgeted amount/Do not exceed their budget
04	Leave bank cards/credit cards at home
05	Keep VL money separate/in a separate pocket
06	Only play with change/coins on hand/from a "Quarter Can"
08	Eat or drink/Spend money on beer/food
09	Set a time limit/Only go to play before they must be somewhere else
10	Play at specific credit levels/low credits/small bets
11	Stay away from places with machines/Avoid machines
12	Rely on others - to tell them when to stop, hold VL money/bank card (sister, brother, spouse, friend)
13	Never borrow money/Pay bills first
16	Play two people to one machine (i.e., split wins/loses)
20	Cash-out strategies (cash out as soon as credits are higher than what was put in)
21	Quit playing altogether
22	Go to Gamblers Anonymous
23	Play other games of chance instead (e.g., Bingo)
25	Spouse/partner controls money

VERBATIMS

Q24c. Do you know of any strategies or actions that other people have to help keep their spending under control each time?

CODE 02 - ONLY BRING BUDGETED AMOUNT/SMALL AMOUNT OF MONEY/NO EXTRA MONEY

- Only take so much into the tavern - that's it;
- They keep their money at home.

CODE 03 - LEAVE WHEN VL MONEY IS GONE/SPENT BUDGETED AMOUNT/DO NOT EXCEED THEIR BUDGET

- The set themselves a budget - if they lose, they leave.

CODE 04 - LEAVE BANK CARDS/CREDIT CARDS AT HOME

- Don't take their bank cards;
- Leave their credit/bank cards at home;
- Yes, they leave their bank cards home and leave all of their credit cards home.

CODE 05 - KEEP VL MONEY SEPARATE/IN A SEPARATE POCKET

- Put spending money in one pocket, VL money in the other;
- Leave money in cars so they don't have it on them to spend, they'd have to go get it.

CODE 06 - ONLY PLAY WITH CHANGE/COINS ON HAND/FROM A "QUARTER CAN"

- He keeps a "Quarter Can" and only uses that money for VL play;
- Use change--only use the change you have in your pocket. Don't use bills to make change.

CODE 08 - EAT OR DRINK/SPEND MONEY ON BEER/FOOD

- Buy drinks first and then play.

CODE 09 - SET A TIME LIMIT/ONLY GO TO PLAY BEFORE THEY MUST BE SOMEWHERE ELSE

- Play close to closing time.

VERBATIMS

Q24c. Do you know of any strategies or actions that other people have to help keep their spending under control each time? - Continued

CODE 10 - PLAY AT SPECIFIC CREDIT LEVELS/LOW CREDITS/SMALL BETS

- Bet smaller--money lasts longer.

CODE 11 - STAY AWAY FROM PLACES WITH MACHINES/AVOID MACHINES

- One guy got himself barred from the establishment;
- Asked to be barred from the place so they couldn't play anymore.

CODE 12 - RELY ON OTHERS - TO TELL THEM WHEN TO STOP, HOLD VL MONEY/BANK CARD (SISTER, BROTHER, SPOUSE, FRIEND)

- Some have wives that hold the money;
- Someone smacks them on the back of the head because they want to play;
- They get a friend to pull the fire alarm;
- One brings his wife--she criticizes him for blowing too much money in the machines and instead of fighting, he'd just leave;
- Have someone else hold their money so they won't spend it.

CODE 13 - NEVER BORROW MONEY/PAY BILLS FIRST

- Pay bills first and play with what's left.

CODE 16 - PLAY TWO PEOPLE TO ONE MACHINE (I.E., SPLIT WINS/LOSES)

- Taking turns, two people playing the one machine--that way, you split winnings and loses.

CODE 20 - CASH-OUT STRATEGIES (CASH OUT AS SOON AS CREDITS ARE HIGHER THAN WHAT WAS PUT IN)

- They cash in when they get more money than they put in;
- They will cash out at \$10.00 and then play again so they end up staying ahead.

CODE 21 - QUIT PLAYING ALTOGETHER

- Know people that don't go anymore - to stop, they just don't go;
- Some people won't go at all to play VLT machines;
- Quit playing is the main one I know of.

VERBATIMS

Q24c. Do you know of any strategies or actions that other people have to help keep their spending under control each time? - Continued

CODE 22 - GO TO GAMBLERS ANONYMOUS

- A friend went to G.A.

CODE 23 - PLAY OTHER GAMES OF CHANCE INSTEAD (E.G., BINGO)

- They go to Bingo instead.

CODE 25 - SPOUSE/PARTNER CONTROLS MONEY

- Give their wife their cheque;
- They give all money to their spouse or partner.

CODING

**Q25b. On average, what dollar amount is that? (Dollar amount at which you cash out)
(CODES FOR NON-NUMERIC ANSWERS)**

CODE	DESCRIPTION
01	It varies
02	When I double my money
03	Depends on how much I put in

SUMMARY TABLE

**Q27a. What bet level, that is, number of credits do you prefer to play at for each play or spin?
CODE 997 - OTHER**

DESCRIPTION	TOTAL
Varies	2
Varies between 8 - 15	1
Between 10 - 50	1
Varies, depends on day mood. Hard question.	1
It always changes	1
No preference, it varies every time	1
Don't know	1

SUMMARY TABLE

Q27b. How much is each credit worth?

CODE 997 - OTHER

DESCRIPTION	TOTAL
\$1 could be 10¢, depends on machine game	1
5¢ - \$1 credit	1

CODING

Q30. On average, how much money would you bring to a location to spend at one time on VL play? (CODES FOR NON-NUMERIC ANSWERS)

CODE	DESCRIPTION
01	No specific amount/Spend cash on-hand
02	Varies/Depends on the situation
03	Whatever money is left over after beer/food purchases

VERBATIMS

Q30. On average, how much money would you bring to a location to spend at one time on VL play? (CODES FOR NON-NUMERIC ANSWERS)

CODE 01 - NO SPECIFIC AMOUNT/SPEND CASH ON-HAND
<ul style="list-style-type: none"> • Whatever I have on me; • No particular amount, I always have money on me and sources to get it; • I'm just there with spending money so I use my pocket change; • I never go specifically to play so I don't bring a specific amount; • I don't intentionally bring money to spend on just the machines.

CODE 02 - VARIES/DEPENDS ON THE SITUATION
<ul style="list-style-type: none"> • Varies - depends on who I'm with, how long I'm going to be at the legion.

CODE 03 - WHATEVER MONEY IS LEFT OVER AFTER BEER/FOOD PURCHASES
<ul style="list-style-type: none"> • \$100 to spend on drinking and VL - whatever is left after we finished drinking; • I don't bring any to spend at one time on VL play - I just spend leftover beer money, maybe \$20 in a given night; • No specific amount because I never go specifically to play the machines, I go to have a beer and end up playing the machines with whatever change is left.

CODING
Q37b. Is there a specific reason why you don't drink when you play?

CODE	DESCRIPTION
00	No specific reason/Just don't drink when I play/Not in the mood to drink when I'm playing
01	Non-drinker/Don't usually drink at all
02	I'm driving
03	Spend more money than I should/than usual
04	Spend more time playing than I should/than usual
05	Don't know when to stop/Keep playing even when I'm losing
12	Rather put money in machine
13	No alcohol served/illegal locations (e.g., store)
20	Other

VERBATIMS

Q37b. Is there a specific reason why you don't drink when you play?

CODE 00 - NO SPECIFIC REASON/JUST DON'T DRINK WHEN I PLAY/NOT IN THE MOOD TO DRINK WHEN I'M PLAYING
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- | |
|--|
| <ul style="list-style-type: none"> • Just not in the mood to drink when I play VL games; • No specific reason - I'm a social drinker but I don't drink when I play; • Not really - you are in a trance playing, don't think of anything; • I'm too busy playing. |
|--|

CODE 01 - NON-DRINKER/DON'T USUALLY DRINK AT ALL

- | |
|---|
| <ul style="list-style-type: none"> • Don't drink anytime; • No, not much of a drinker; • Well, I'm on medication so I don't drink; • I just don't drink; • I don't drink at all, that's the only reason; • I take medication. |
|---|

CODE 02 - I'M DRIVING

- | |
|--|
| <ul style="list-style-type: none"> • Because I'm driving; • I finally got my license back from drinking and driving. When I play, I drive into town and I don't want to lose it for a fourth time. |
|--|

CODE 03 - SPEND MORE MONEY THAN I SHOULD/THAN USUAL
--

- | |
|--|
| <ul style="list-style-type: none"> • Yes, when you drink, all the money goes - I gamble it all until I'm flat broke; • If I drank, there may be a possibility I'd use my bank card and get more money. |
|--|

VERBATIMS**Q37b. Is there a specific reason why you don't drink when you play? - Continued****CODE 12 - RATHER PUT MONEY IN MACHINE**

- I only bring so much money with me and it's not spent on drinks;
- Can't afford it;
- Spend money on the VLT's and not on a drink. When I go to drink, I drink, but when I go to play, I play.

CODE 13 - NO ALCOHOL SERVED/ILLEGAL LOCATIONS (E.G., STORE)

- No alcohol served;
- You can't get booze down here in Eskasoni, so I don't have a habit of drinking.

CODE 20 - OTHER

- I'm playing during working hours, can't drink;
- I just don't because I'm curling and only play during games;
- I play Bingo after I play.

CODING
Q37g. How does it affect your play? (the amount you drink)

CODE	DESCRIPTION
03	Spend more money than I should/than usual
04	Spend more time playing than I should/than usual
05	Don't know when to stop/Keep playing even when I'm losing
06	Increase bet level/credit level/Take more risks
07	Don't pay as much attention/Increases my chance of losing/Trouble concentrating on game
08	Vision blurs/Can't watch/follow the screen
09	Become carefree - don't worry/care about what I'm spending or if I'm losing
10	Affects reactions to winning/losing
11	Slows reflexes/Can't hit stop button effectively

VERBATIMS
Q37g. How does it affect your play? (the amount you drink)
CODE 03 - SPEND MORE MONEY THAN I SHOULD/THAN USUAL

- Makes me spend probably more than I should;
- I think they put them in the bars so you'd spend more;
- I think anybody who drinks while playing spends more money - I haven't, but I've seen others do it;
- The more I drink, the more I spend;
- I spend more.

CODE 04 - SPEND MORE TIME PLAYING THAN I SHOULD/THAN USUAL

- I play more, that's it;
- The more I drink, the longer I play.

CODE 05 - DON'T KNOW WHEN TO STOP/KEEP PLAYING EVEN WHEN I'M LOSING

- Makes you careless, don't give a damn and keep playing even if losing;
- You don't know when to quit;
- You lose, but you still keep playing anyway.

CODE 06 - INCREASE BET LEVEL/CREDIT LEVEL/TAKE MORE RISKS

- I take more of a gamble and increase bets when I've had a lot to drink;
- Making bigger bets, if only by a little;
- Then I bet the max., but I stop after my \$20 - I just spend it faster;
- The more I drink, the more I feel it, I bet more;
- I'm bored 10 times quicker so I put the machine on max. bet and either lose my money or take out \$5 to \$10;
- The more I drink, the larger the bet;
- You get more cocky, more chances are taken - for example, you "up" your bets more often and higher than if you were not drinking;
- Make larger bets.

CODE 07 - DON'T PAY AS MUCH ATTENTION/INCREASES MY CHANCE OF LOSING/TROUBLE CONCENTRATING ON GAME

- If I'm drinking I am sloppy and not paying attention to the game (but it still doesn't change chances of winning);
- I wasn't paying attention to what I was doing;
- Increases my chances of losing;
- Not quite focused on what you're doing;
- Throw away the wrong card if playing poker game.

VERBATIMS

Q37g. How does it affect your play? (the amount you drink) - Continued

CODE 08 - VISION BLURS/CAN'T WATCH/FOLLOW THE SCREEN

- I can't watch the little things spinning around;
- My vision gets blurred and I can't see the screen.

CODE 09 - BECOME CAREFREE - DON'T WORRY/CARE ABOUT WHAT I'M SPENDING OR IF I'M LOSING

- Get more carefree, don't worry about what you lose;
- Get too carefree - usually have better odds maybe because I don't think or worry as much.

CODE 10 - AFFECTS REACTIONS TO WINNING/LOSING

- It affects how you take the outcome - if I win, I'm happy but if I lose, I'm disappointed for a minute.

CODE 11 - SLOWS REFLEXES/CAN'T HIT STOP BUTTON EFFECTIVELY

- My reaction time is slower to use the stop button.

CODING
Q41b. What is it you do to improve your chances of winning?

CODE	DESCRIPTION
01	Change bet levels (raise, drop, fluctuate, special series of bets)
02	Use the stop button feature/Quick stops
03	Rub/Kick the machine
04	Talk to the machine
05	Play specific machine(s) (i.e., machines that haven't been played much that day/play machines that people lose on)
06	Cross my fingers
07	Pray
08	Change the screen/Game (switch to Aces Fever (screen), help screen, pay table)
09	Count cards/Sevens - try to anticipate which cards will come up/when sevens will come up
10	Put a lucky charm on the machine/Bring a lucky charm
11	Put more money in the machine
12	Keep play button pressed
13	Play with someone else
23	Switch/Change seats or hands pushing buttons
30	Other
97	Refused (Trade secret can't tell ya)

VERBATIMS
Q41b. What is it you do to improve your chances of winning?
CODE 01 - CHANGE BET LEVELS (RAISE, DROP, FLUCTUATE, SPECIAL SERIES OF BETS)

- Raise the bet;
- I fluctuate my bet;
- I put in a loonie and bet 1 credit for 5 times, then I bet the 15 I have left. Chances are I didn't win for the first 5 times so the 15 credits may actually hit something worthwhile OR there's the other thing where I lose it - oh well, it's a loonie;
- Change bets around in hopes it will pay out higher, then I lower the bet when I start losing credits;
- After a few with "no gain," I bet higher because it'll payout then.

CODE 02 - USE THE STOP BUTTON FEATURE/QUICK STOPS

- Stop the machine when I play Swinging Bells - I don't let it roll;
- Try to stop the machine and hope I win;
- Quick stops - bet-stop, bet-stop -- it doesn't work;
- I stop it after two 7's are showing because I think I have a better chance to get the third 7.

CODE 03 - RUB/KICK THE MACHINE

- I rub it;
- I rub the machine;
- I kick the machine.

CODE 04 - TALK TO THE MACHINE

- Call it (the machine) Sally and talk to it nicely;
- Swear a lot at the machines.

CODE 05 - PLAY SPECIFIC MACHINE(S) (I.E., MACHINES THAT HAVEN'T BEEN PLAYED MUCH THAT DAY/MACHINES PEOPLE LOSE ON)

- If you win you change machines, if someone doesn't win or loses and leaves, take that one.

CODE 06 - CROSS MY FINGERS

- I cross my fingers.

VERBATIMS
Q41b. What is it you do to improve your chances of winning? - Continued
CODE 07 - PRAY

- Pray.

CODE 08 - CHANGE THE SCREEN (SWITCH TO ACES FEVER SCREEN, HELP SCREEN, PAY TABLE)

- I switch the screen over to the next screen (Aces Fever) then flick it back to The Bells to change the luck, but I don't play the other game - just flick the screen over;
- Change the game if I'm not winning.

CODE 09 - COUNT CARDS/SEVENS - TRY TO ANTICIPATE WHICH CARDS WILL COME UP/WHEN SEVENS WILL COME UP

- I pay more attention and try to remember the cards to see which cards would come up more frequently;
- Count the times sevens don't come up on the screen and time it, then increase the bet if I think they will come up;
- If certain things come up, like corners of 7's, the bonus reaches 180, I can usually predict when the bells will come.

CODE 10 - PUT A LUCKY CHARM ON THE MACHINE/BRING A LUCKY CHARM

- I take off my glasses and lay them on the machine.

CODE 11 - PUT MORE MONEY IN THE MACHINE

- I put in \$40 and hope that helps.

CODE 12 - KEEP PLAY BUTTON PRESSED

- Hold the button 30 - 40 spins.

CODE 13 - PLAY WITH SOMEONE ELSE

- Play with someone else;
- If a friend is having good luck, I let him play my machine to see if he can win me some money.

VERBATIMS

Q41b. What is it you do to improve your chances of winning? - Continued

CODE 23 - SWITCH/CHANGE SEATS OR HANDS PUSHING BUTTONS

- Sometimes I use my pinky fingers.

CODE 30 - OTHER

- I don't look at the screen.

CODING
Q42b. What are they? (Superstitions or rituals you use when playing)

CODE	DESCRIPTION
01	Change bet levels (raise, drop, fluctuate, special series of bets, "lucky" bet level)
02	Use the stop button feature
03	Rub the machine
04	Talk to the machine/Chant
05	Play specific machine(s) (i.e., machines that haven't been played much that day, play machines people lose on)
06	Cross my fingers
07	Pray
08	Change the screen (switch to Aces Fever screen, help screen, pay table)/Wait for screen to change before adding money
09	Count cards/sevens - try to anticipate which cards will come up/when sevens will come up
10	Put a lucky charm on the machine/Bring a lucky charm
11	Put more money in the machine
13	Play with someone else
20	Watch what I say/what others say to me
21	Always smoke
22	Keep "bad luck" thoughts/people away
23	Switch/change seats or hands pushing buttons
30	Other
97	Refused (secret)
99	Don't Know

VERBATIMS
Q42b. What are they? (Superstitions or rituals you use when playing)
CODE 01 - CHANGE BET LEVELS (RAISE, DROP, FLUCTUATE, SPECIAL SERIES OF BETS, "LUCKY" BET LEVEL)

- If I press it on a three bet a couple of times and I win, I will change the bet;
- Betting a lucky number of credits - for example, if the bonus is an even number, I bet odd - if that's not working, then I bet the amount of the last two digits in the bonus - if that's not working, then I bet even if the bonus is even;
- Play Lucky 13 for the bet;
- I call the yellow pages horoscope line, get my lucky number and I bet that number of credits that night;
- My uncle won on 17 bet, so I always bet 17;
- Same bet every time to a certain level, then max. bet.

CODE 03 - RUB THE MACHINE

- I give it (the machine) a little rub for good luck.

CODE 04 - TALK TO THE MACHINE/CHANT

- I have a chant: 7, 7, 7, 7 or Bells, Bells, Bells - but that's just wishful thinking;
- I talk nice to the machine, be nice to it.

CODE 05 - PLAY SPECIFIC MACHINE(S) (I.E., MACHINES THAT HAVEN'T BEEN PLAYED MUCH THAT DAY, PLAY MACHINES PEOPLE LOSE ON)

- Play a machine a lot of people put money in so far and didn't pay out.

CODE 07 - PRAY

- Say a little prayer.

CODE 08 - CHANGE THE SCREEN (SWITCH TO ACES FEVER SCREEN, HELP SCREEN, PAY TABLE)/WAIT FOR SCREEN TO CHANGE BEFORE ADDING MONEY

- When I cash out, I wait until the game flashes to the regular screen before I put more money in.

VERBATIMS
Q42b. What are they? (Superstitions or rituals you use when playing) - Continued
CODE 10 - PUT A LUCKY CHARM ON THE MACHINE/BRING A LUCKY CHARM

- Put a penny on the start button;
- If I find a penny with the head up or a clothespin, I bring it with me;
- I flip a loonie, if it lands with its head up, I lay it on the machine while I play;
- Bring my lucky charm, a rabbit's food my father gave me when I was ten years old.

CODE 20 - WATCH WHAT I SAY/WHAT OTHERS SAY TO ME

- Don't want anyone to wish me good luck.

CODE 21 - ALWAYS SMOKE

- I always have a smoke in my hand;
- Light a cigarette, let it burn out, keep lighting them, one after the other.

CODE 22 - KEEP "BAD LUCK" THOUGHTS/PEOPLE AWAY

- Keep a certain friend away because he is bad luck;
- I have a superstition: the government runs these things and I think the government sucks and I don't win, so to win I can't think or say "The government sucks" - it's bad luck;
- Don't like people standing behind me.

CODE 23 - SWITCH/CHANGE SEATS OR HANDS PUSHING BUTTONS

- I usually play with a friend so I switch sides or seats;
- Sometimes I use a certain hand (left).

CODE 30 - OTHER (n=6)

- Parking in the same spot where I won one night;
- I think sitting brings me bad luck;
- If my left hand is itching, I believe I'm going to win;
- I always get a Pepsi, anytime I have had a Pepsi, I have won;
- Turn away if I think I'm going to get a straight flush or when the bells start to appear;
- I put quarters in the machine rather than loonies, I usually win a little.

CODING

Q49d. Are there any other physical, emotional or behavioural responses you have when playing the machines?

CODE	DESCRIPTION
00	None/No others
PHYSICAL RESPONSES:	
01	Crying
02	Relaxed
03	Stiff neck/Back/Arm/Hand
04	Claustrophobic
05	Ears hurt (due to loud noises)
EMOTIONAL RESPONSES:	
11	Guilty/Ashamed
12	Disgusted with myself
13	Surprised (when I win)
BEHAVIOURAL RESPONSES:	
21	Giggling/Laughing
22	Talk to myself
99	Don't Know

CODING
Q55e. How did you get your VL spending/play under control?

CODE	DESCRIPTION
01	Budgeted time/Reduced time spent playing/Cut back number of hours spent playing
02	Budgeted money/Only brought budgeted amount/small amount of money
03	Left when my VL money was gone/spent budgeted amount/Stopped exceeding my budget
04	Left bank cards/credit cards at home
07	Willpower (i.e., just get up and leave, stopped using bank card, still go to bars but do not play machines)
08	Eat or drink more/Spent more money on beer/food instead
09	Reduced frequency of play (i.e., twice per week instead of 10 times, only on weekends)
11	Staying away from places with machines/Avoiding machines
12	Help/support from others - to tell me when to stop, hold VL money/bank card (sister, brother, spouse, friend)
13	Stopped borrowing money/Pay bills first
14	Thinking about/seeing problems caused by VL play (self and others)
15	Prayer/Religion
21	Quit playing altogether
23	Play other games of chance instead (e.g., Bingo, cards)
24	Participating in other activities (i.e., visiting friends, working more)
25	Spouse/partner controls all our money (i.e., pay cheque goes into wife's bank account)
26	Discussions/talk with spouse/partner

VERBATIMS

Q55e. How did you get your VL spending/play under control?

CODE 01 - BUDGETED TIME/REDUCED TIME SPENT PLAYING/CUT BACK NUMBER OF HOURS SPENT PLAYING
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- | |
|--|
| <ul style="list-style-type: none"> • Manage it with a budget - stick to the budget of time (and money amounts); • Have cut back hours of playing; • I set a budget of time (and money). |
|--|

CODE 02 - BUDGETED MONEY/ONLY BROUGHT BUDGETED AMOUNT/SMALL AMOUNT OF MONEY
--

- | |
|---|
| <ul style="list-style-type: none"> • Manage it with a budget - stick to the budget of (time and) money amounts; • I set a budget of (time and) money; • I just took a set amount of money and left the rest in the bank. |
|---|

CODE 03 - LEFT WHEN MY VL MONEY WAS GONE/SPENT BUDGETED AMOUNT/ STOPPED EXCEEDING MY BUDGET
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- | |
|--|
| <ul style="list-style-type: none"> • Stuck to my budget no matter what. |
|--|

CODE 07 - WILLPOWER (I.E., JUST GET UP AND LEAVE, STOPPED USING BANK CARD, STILL GO TO BARS BUT DO NOT PLAY MACHINES)
--

- | |
|--|
| <ul style="list-style-type: none"> • I never played when I was there (where the machines are); • I made up my mind, there are more important things to spend my money on; • Self control, just strong will. |
|--|

CODE 08 - EAT OR DRINK MORE/SPENT MORE MONEY ON BEER/FOOD INSTEAD
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- | |
|--|
| <ul style="list-style-type: none"> • I drink more so my money goes to booze and I've less for machines. |
|--|

CODE 09 - REDUCED FREQUENCY OF PLAY (E.G., TWICE PER WEEK INSTEAD OF 10 TIMES, ONLY ON WEEKENDS)

- | |
|---|
| <ul style="list-style-type: none"> • I reduced my play - I used to play once a week and now I'm down to once or twice a month; • By only going on weekends; • Just stopped playing as often. |
|---|

VERBATIMS
Q55e. How did you get your VL spending/play under control? - Continued
CODE 11 - STAYING AWAY FROM PLACES WITH MACHINES/AVOIDING MACHINES

- I just don't go to the places that have them (VLT's);
- Quit working in the bar (6-close) every night, after work I played the games.

CODE 12 - HELP/SUPPORT FROM OTHERS - TO TELL ME WHEN TO STOP, HOLD VL MONEY/BANK CARD (SISTER, BROTHER, SPOUSE, FRIEND)

- Just took control of the things I could control - gave bank card to my girlfriend.

CODE 13 - STOPPED BORROWING MONEY/PAY BILLS FIRST

- Pay my bills first and VL games come second;
- I incurred more debt, so I had to stop because I ran out of money to play.

CODE 14 - THINKING ABOUT/SEEING PROBLEMS CAUSED BY VL PLAY (SELF AND OTHERS)

- I work at a bar and I saw how much people were put in and how disgusting it was.

CODE 15 - PRAYER/RELIGION

- I made a church novena again and it helped even though I'm not a church goer.

CODE 21 - QUIT PLAYING ALTOGETHER

- Just stopped playing;
- I quit for seven months;
- I quit - I stopped, just plain stopped - I didn't do anything but say I'm stopping, and I did;
- I gave it up for a year and haven't had the problem since I started playing again;
- Just stopped;
- I went away to B. C. and they don't have them in the bars so I stopped for a while.

VERBATIMS

Q55e. How did you get your VL spending/play under control? - Continued

CODE 24 - PARTICIPATING IN OTHER ACTIVITIES (E.G., VISITING FRIENDS, WORKING MORE)

- We'll play cards, visit friends - to not go and play the machines;
- My work habits, I now have a different schedule at work so I have less time to play.

CODE 25 - SPOUSE/PARTNER CONTROLS ALL OUR MONEY (E.G., PAY CHEQUE GOES INTO WIFE'S BANK ACCOUNT)

- I give my wife my credit cards, my pay cheque goes into her account - when I need money, I go to her now.

CODE 26 - DISCUSSIONS/TALK WITH SPOUSE/PARTNER

- We talked about it, talk about the kids - to not go and play the machines.

CODING

Q55f. Are there any ways that you tried to control your spending or play that were unsuccessful in the long run?

CODE	DESCRIPTION
00	No/None
02	Budgeted money/Only brought budgeted amount/small amount of money
03	Left when my VL money was gone/spent budgeted amount/Stopped exceeding my budget
04	Left bank cards/credit cards at home
05	Kept VL money separate/in a separate pocket
07	Willpower (i.e., just get up and leave, stopped using bank card, still go to bars but do not play machines)
09	Reduced frequency of play (e.g., twice per week instead of 10 times, only on weekends)
11	Staying away from places with machines/Avoiding machines
13	Stopped borrowing money/Pay bills first
14	Thinking about/seeing problems caused by VL play (self and others)
15	Prayer/Religion
24	Participating in other activities (e.g., visiting friends)
25	Spouse/partner controls all our money (e.g., pay cheque goes into wife's bank account)

VERBATIMS

Q55f. Are there any ways that you tried to control your spending or play that were unsuccessful in the long run?

CODE 00 - NO/NONE

- Nothing has been unsuccessful because I'm still working on it.

CODE 02 - BUDGETED MONEY/ONLY BROUGHT BUDGETED AMOUNT/SMALL AMOUNT OF MONEY

- Saying you will just spend \$10 but it leads to \$20, then \$50 - you just have to stop;
- Putting aside money (in the bank) and only bringing a certain amount, then end up getting other money - if I brought my bank card, I would always end up getting money out.

CODE 05 - KEPT VL MONEY SEPARATE/IN A SEPARATE POCKET

- Separate money - putting aside money in the bank, then end up getting it out.

CODE 07 - WILLPOWER (I.E., JUST GET UP AND LEAVE, STOPPED USING BANK CARD, STILL GO TO BARS BUT DO NOT PLAY MACHINES)

- None, other than going out JUST for a drink because once we're there, we're playing.

CODE 09 - REDUCED FREQUENCY OF PLAY (E.G., TWICE PER WEEK INSTEAD OF 10 TIMES, ONLY ON WEEKENDS)

- Tried not going for just one week but we still spent the same amount as if we were playing four times a week so we went back to four times a week.

CODE 15 - PRAYER/RELIGION

- I made a church novena.

CODE 24 - PARTICIPATING IN OTHER ACTIVITIES (E.G., VISITING FRIENDS, WORKING MORE)

- Going out for walks or visiting people, playing music.

CODING

**Q56c. Approximately how many times have you gone through periods when you made a concerted effort to control your VL play, either alone or with the help of someone else?
 (CODES FOR NON-NUMERIC ANSWERS)**

CODE	DESCRIPTION
01	Constantly/Several times per day
99	Don't Know

CODING

Q56d. What, if any, ways have you personally tried to control your spending/play that were relatively successful in the long run?

CODE	DESCRIPTION
00	No/None
01	Budgeted time/Reduced time spent playing/Cut back number of hours spent playing
02	Budgeted money/Only brought budgeted amount/small amount of money
03	Left when my VL money was gone/spent budgeted amount/Stopped exceeding my budget
04	Left bank cards/credit cards at home/Cut up bank card
05	Kept VL money separate/in a separate pocket
06	Only played with change/coins on hand/from a "Quarter Can"
07	Willpower (i.e., just get up and leave, still go to bars but do not play machines)
09	Reduced frequency of play (e.g., twice per week instead of 10 times, only on weekends)
11	Staying away from places with machines/Avoiding machines/Stay home
12	Help/support from others - to tell me when to stop, hold VL money/bank card (sister, brother, spouse, friend)
13	Stopped borrowing money/Stayed broke
15	Prayer/Religion
21	Quit playing altogether
22	Went to Gamblers Anonymous/Got professional help
24	Participating in other activities (e.g., visit friends, work overtime, go to movies)
25	Spouse/partner controls all our money (e.g., pay cheque goes into wife's bank account)
26	Discussions/talk with spouse/partner

VERBATIMS

Q56d. What, if any, ways have you personally tried to control your spending/play that were relatively successful in the long run?

<p>CODE 02 - BUDGETED MONEY/ONLY BROUGHT BUDGETED AMOUNT/SMALL AMOUNT OF MONEY</p>

- | |
|--|
| <ul style="list-style-type: none"> • I've found only bringing my budgeted amount and sticking to it is successful; • Setting an amount has been successful for me - (to say I will only play on a certain day and) take that amount (\$40) and only that amount; • Only taking so much money with me. |
|--|

<p>CODE 04 - LEFT BANK CARDS/CREDIT CARDS AT HOME/CUT UP BANK CARD</p>

- | |
|---|
| <ul style="list-style-type: none"> • Cutting up bank card. |
|---|

<p>CODE 07 - WILLPOWER (I.E., JUST GET UP AND LEAVE, STOPPED USING BANK CARD, STILL GO TO BARS BUT DO NOT PLAY MACHINES)</p>

- | |
|--|
| <ul style="list-style-type: none"> • If I win a lot then I would walk away and wouldn't spend so much for a while; • Just thinking I should stop never helped; • Playing pool, totally avoiding the place where the machines are. |
|--|

<p>CODE 09 - REDUCED FREQUENCY OF PLAY (E.G., TWICE PER WEEK INSTEAD OF 10 TIMES, ONLY ON WEEKENDS)</p>
--

- | |
|--|
| <ul style="list-style-type: none"> • To say I will only play on a certain day (and take that amount (\$40) and only that amount); • Arrive when machines are busiest or close to closing time. |
|--|

<p>CODE 11 - STAYING AWAY FROM PLACES WITH MACHINES/AVOIDING MACHINES/STAY HOME</p>
--

- | |
|--|
| <ul style="list-style-type: none"> • I stay home; • I don't go out to the place; • I tried to stay away from the bar scene; • Try to avoid those places; • Tried to stay away from them altogether. |
|--|

<p>CODE 12 - HELP/SUPPORT FROM OTHERS - TO TELL ME WHEN TO STOP, HOLD VL MONEY/BANK CARD (SISTER, BROTHER, SPOUSE, FRIEND)</p>

- | |
|---|
| <ul style="list-style-type: none"> • I'd say I was going to use \$50 and take out \$50 then give bill money to a relative (someone I trust) who wouldn't give it back until a certain date when I needed to pay bills. |
|---|

VERBATIMS

Q56d. What, if any, ways have you personally tried to control your spending/play that were relatively successful in the long run? - Continued

CODE 13 - STOPPED BORROWING MONEY/STAYED BROKE

- I just stayed broke.

CODE 15 - PRAYER/RELIGION

- Asked my daughter to pray for me and I quit for four months after that.

CODE 22 - WENT TO GAMBLERS ANONYMOUS/GOT PROFESSIONAL HELP

- Gamblers Anonymous.

CODE 24 - PARTICIPATING IN OTHER ACTIVITIES (E.G., VISIT FRIENDS, WORK OVERTIME, GO TO MOVIES)

- Try to visit others so I won't play as much - if I visit people, I may not play the games as much;
- Just working overtime to keep me tired and busy;
- Look for less expensive activities like movies, for example;
- Keep busy--housework, cook supper, etc.;
- Spend money on something else.

CODE 26 - DISCUSSIONS/TALK WITH SPOUSE/PARTNER

- Spousal support through discussion;
- Talk with my husband.

CODING

Q56e. What, if any, ways have you tried to control your spending/play that were relatively unsuccessful in the long run?

CODE	DESCRIPTION
00	No/None
01	Budgeted time/Reduced time spent playing/Cut back number of hours spent playing
02	Budgeted money/Only brought budgeted amount/small amount of money
03	Left when my VL money was gone/spent budgeted amount/Stopped exceeding my budget
04	Left bank cards/credit cards at home/Cut up bank card
05	Kept VL money separate/in a separate pocket
07	Willpower (i.e., just get up and leave, still go to bars but do not play machines)
09	Reduced frequency of play (e.g., twice per week instead of 10 times, only on weekends)
10	Playing at specific credit levels/low credits/small bets
11	Staying away from places with machines/Avoiding machines/Stay home
12	Help/support from others - to tell me when to stop, hold VL money/bank card (sister, brother, spouse, friend)
14	Thinking about/seeing problems caused by VL play (self and others)
15	Prayer/Religion
21	Quit playing altogether
22	Went to Gamblers Anonymous/Got professional help
24	Participating in other activities (e.g., visit friends, work overtime, go to movies)
99	Don't Know

VERBATIMS

Q56e. What, if any, ways have you tried to control your spending/play that were relatively unsuccessful in the long run?

CODE 04 - LEFT BANK CARDS/CREDIT CARDS AT HOME/CUT UP BANK CARD

- Leaving the cards at home because if I want to play, I get in my car, go back home and get the cards - keep trying, and I keep starting the car.

CODE 05 - KEPT VL MONEY SEPARATE/IN A SEPARATE POCKET

- Used to walk in with large amounts and say I am going to spend \$40 and always spend more - now, I only take \$40.

CODE 07 - WILLPOWER (I.E., JUST GET UP AND LEAVE, STOPPED USING BANK CARD, STILL GO TO BARS BUT DO NOT PLAY MACHINES)

- I tried to spend my time there talking to friends but I always ended up playing;
- Going to an establishment and try not to go near a machine - I always will;
- Trying to go and watch people play.

CODE 09 - REDUCED FREQUENCY OF PLAY (E.G., TWICE PER WEEK INSTEAD OF 10 TIMES, ONLY ON WEEKENDS)

- Just going a little is not successful because if I'm around them, I want to play.

CODE 11 - STAYING AWAY FROM PLACES WITH MACHINES/AVOIDING MACHINES/STAY HOME

- I tried staying away, but I volunteer there (legion hall) so I have to go;
- Avoiding the machines - it's impossible, too many - they're everywhere.

CODE 14 - THINKING ABOUT/SEEING PROBLEMS CAUSED BY VL PLAY (SELF AND OTHERS)

- Just thinking I should never helped - I had to stop it by not going near it.

VERBATIMS

Q56e. What, if any, ways have you tried to control your spending/play that were relatively unsuccessful in the long run? - Continued

CODE 21 - QUIT PLAYING ALTOGETHER

- Tried to stay off of playing.

CODE 22 - WENT TO GAMBLERS ANONYMOUS/GOT PROFESSIONAL HELP

- Called the helpline.

CODING

Q57e. What ways, if any, have others tried to help you that were relatively successful in the long run?

CODE	DESCRIPTION
00	Nothing/None were successful
01	Moral support/Discussions/Advice
02	Spouse/partner controlling our money
03	Invitations to/Participation in activities other than gambling
04	Pamphlets/Printed material
05	Quit playing together (spouse, friend)
06	Meetings (Gamblers Anonymous)
07	Monitoring of play/Phone calls to location(s)
20	Nagging/Lots of questions
21	Threats
22	"Stickers" on VL machines
30	Other

VERBATIMS

Q57e. What ways, if any, have others tried to help you that were relatively successful in the long run?

CODE 01 - MORAL SUPPORT/DISCUSSIONS/ADVICE

- It depends on the individual - my friends were helpful, but not really in the long run. They tried to talk to me and some were reasonable and I know it's for my own good. The advice that I did take was helpful, like not to go to bars. It works, until I decide I want to go again - the choice is mine;
- They talked with me - I told them I was quitting and don't want them asking me to go with them to play VL games - they keep their word and don't call me to play;
- They were just explaining that it is a waste of time and money, showing me how I'd have all this extra money if I gave it up that I could spend somewhere else on something nice;
- They just talk to you, that's all (didn't really help that much);
- I sometimes listen to my husband;
- The encouragement from my boyfriend was successful;
- My daughter praying for me, my friend when I told her that I went to play the night before, she said why didn't you call me, I would have stopped you, that gave me encouragement to quit, that I have friends who care.

CODE 02 - SPOUSE/PARTNER CONTROLLING OUR MONEY

- My wife taking control of my money;
- She gave me a budget, and that's it for coffee, smokes, machines, that's it (I love my kids too and I try to always think of them first);
- My girlfriend doesn't give me access to my bank card or account and this keeps it under control.

CODE 03 - INVITATIONS TO/PARTICIPATION IN ACTIVITIES OTHER THAN GAMBLING

- Other activities, inviting me to do things that didn't include gambling;
- Friend and I did things together rather than VL games.

CODE 05 - QUIT PLAYING TOGETHER (SPOUSE, FRIEND)

- Both of us (my wife and I) played and she stopped too, so she offered me the moral support to stop and I did the same for her - we stopped together and only go out together.

CODE 06 - MEETINGS (GAMBLERS ANONYMOUS)

- Gamblers Anonymous--attendance at meetings is helpful.

VERBATIMS

Q57e. What ways, if any, have others tried to help you that were relatively successful in the long run? - Continued

CODE 07 - MONITORING OF PLAY/PHONE CALLS TO LOCATION(S)

- My boss calling me at the bowling alley and making me leave.

CODE 21 - THREATS

- If I don't stop, I don't get a roof over my head, I'll be kicked out.

CODE 30 - OTHER (n=1)

- Took car away, so I couldn't go anywhere.

CODING

Q57f. What ways, if any, have others tried to help you that were relatively unsuccessful in the long run?

CODE	DESCRIPTION
00	Nothing/None were successful
01	Moral support/Discussions/Advice
04	Pamphlets/Printed material
05	Quit playing together (spouse, friend)
06	Meetings (Gamblers Anonymous)
20	Nagging/Lots of questions
21	Threats
22	"Stickers" on VL machines
99	Don't Know

VERBATIMS

Q57f. What ways, if any, have others tried to help you that were relatively unsuccessful in the long run?

CODE 01 - MORAL SUPPORT/DISCUSSIONS/ADVICE

- My husband told me not to go, but I still went;
- They just talk to me - hasn't been successful;
- Recommended I go to Gamblers' Anonymous.

CODE 04 - PAMPHLETS/PRINTED MATERIAL

- Not sure, I didn't read them (pamphlets).

CODE 05 - QUIT PLAYING TOGETHER (SPOUSE, FRIEND)

- Told me I had to stop but I didn't, now I have to.

CODE 20 - NAGGING/LOTS OF QUESTIONS

- Nagging at me, like "you got to do this and that" - I'd say get out of my face;
- Just nagging me unnecessarily because she's my mother - it wasn't helpful because there is no problem;
- Dad asking where the money went and I would just like - asking too many questions;
- Nagging, angry at me all the time.

CODE 21 - THREATS

- Threats - stop or else this would happen or that would happen.

CODE 22 - "STICKERS" ON VL MACHINES

- Stickers on the VLT's are just a pain (have only seen the stickers on the machines, have not made any contact);
- None - not ready to accept help from "the stickers" yet.

SUMMARY TABLE

Q75. What language is your mother tongue?
OTHER (n=13)

DESCRIPTION	TOTAL
MicMac	10
Patois	1
Lebanese	1
Italian	1

SUMMARY TABLE

- Q 57. a) Have you ever gone to any of the following sources for help or information on controlling your VL play? (**READ LIST - PROBE FOR WHO - RECORD BELOW**)
- b) Without your request, have any of these sources volunteered or tried to provide you with information and/or help on controlling your VL play?
- c) Have you ever sought any information or help from any of these sources to help someone else control their VL play?
- d) **FOR ALL MENTIONS:** On a scale of 1 to 5 where 1 means not at all helpful and 5 means extremely helpful, how helpful was the assistance you received from _____ ?

DESCRIPTION (OTHER: n=4)	Help for Self (n=1)	Help From Others (n=3)	Help For Someone Else (n=1)	Rating (out of 5)
Got a mailout at my home	****	1	****	2
Strangers near VLT†	1	1	****	1
TV commercials and pamphlets	****	1	****	1
Put a name on the "banned list" at the casino	****	****	1	5

† *One respondent sought help from strangers near VLT and received unsolicited help from strangers near VLT; this individual rated the source as 1 out of 5 in terms of helpfulness.*

APPENDIX F

GLOSSARY OF TERMS

GLOSSARY OF TERMS

- Aggregate Level of Analysis:** This term refers to market response collectively (as a whole). It is the total sum of effects for a particular market (e.g., the aggregate results for Regular Video Lottery Players are the total combined results for all Players within the province). Typically, analysis at the aggregate level profiles response and/or identifies the degree of change within a particular market, whereas segmentation provides information on what underlies the response or has caused the observed change.
- Continued Adoption:** Continued Adoption refers to the percentage of those who have ever played a game (i.e., trial) and have continued to play the game on a regular basis. (In this report, continued adoption refers to the percentage who have tried video lottery games and continued to play them once a month or more, on average.)
- Demographic Segment:** Refers to subgroups of consumers based on their inclusion in a specific demographic category usually pertaining to age, gender, household income, education, occupation and other social and vital statistics (e.g., 19 to 24 year olds, males).
- Market Segment:** The market is divided into groups which are comprised of adults having similar attitudes and/or behaviours of specific interest. These groups are measurable, definable and targetable for strategic marketing/communications efforts. (In this report, the total Nova Scotian adults population is divided into three Video Lottery Population Segments: Non-VL Players, Casual VL Players and Regular VL Players. Regular Players are further divided into three Player Segments (for the Problem Player analysis): Infrequent Players, Frequent (Non-Problem Players and Problem VL Players.)

Occupation Categories:

White Collar

White Collar occupations are generally salaried positions most of which are performed indoors involving little to no manual labour. The following occupations are included in the White Collar segment:

- Supervisor/Manager/Executive;
- Professionals (Doctor, Lawyer, Engineer, Teacher);
- Owner/Self-Employed;
- Sales Representative/Agent/Insurance Representative, Real Estate, Finance.

Grey Collar

Grey Collar occupations include traditional "skilled and semi-skilled" occupations. Most involve some period of formalized training (e.g., vocational training, apprenticeship, community college). The attainment of a standard of skill is often recognized by a diploma, license or title (e.g., Journeyman). Many of the Grey Collar occupations pay higher wages than do some White Collar positions. The following occupations are included in the Grey Collar category:

- Clerical/Secretarial/Clerk;
- Technical (e.g., electronic, technicians);
- Skilled Service (Police, Nurse, Loans Officer);
- Skilled Trades (Mechanic, Carpenter, Draftsman);
- Armed Forces.

Blue Collar

Blue Collar occupations are generally hourly paid positions involving elementary skill levels which can typically be mastered in a short period of on-the-job training. The jobs involve a large component of manual labour and are classified under unskilled service or unskilled trades. Occupations in this category include:

- Waiter/Taxi Driver, Janitor, Personal Care Worker/Babysitter/Parking Attendant/Orderlies;
- Factory Workers, Labourers, Housekeepers, Painters, Letter Carriers.

Income Supported

This occupation category refers to those individuals who are not currently employed in the work force and, therefore, are referred to as "Income Supported". This segment includes:

- Unemployed;
- Homemakers;
- Retired;
- Disabled (unable to work);
- Students.

- Relative Preference:** This term refers to the percentage of those who have ever played a particular game of chance and comparatively rate it better than other games of chance (i.e., a score of 4 or 5 on a 5-point liking scale).
- Segment Level:** Examines results within and among the various subgroups defined in a particular market to provide additional insight. For example, demographic profiles may be examined at a segment level to define and compare the demographic characteristics of Casual VL Players versus Regular VL Players, or Infrequent VL Players versus Problem VL Players.
- Segmentation Research:** Studies which provide guidelines for an organization's marketing/communications strategy and profile response to pre-defined points of interest for a particular group or groups of adults in the population. This type of research can identify characteristics or behaviours which are typical of a particular group or segment and differentiate adults within this/these groups from other adults in the population.

APPENDIX G
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